User Guide

eScholar DirectMatch® Version 2020

2021-2022

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DirectMatch Flow

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Overview

eScholar DirectMatch™ (DirectMatch) module within eScholar Uniq-ID® (UniqID) is designed to help States and LEAs/Districts quickly and accurately determine the eligibility of children for free and reduced school meal programs through the Direct Certification (DC) process.

The DirectMatch module allows users to:

- Match student enrollment data against program records to determine eligibility using both deterministic and probabilistic matching algorithms.
- Support multiple agency programs such as the Supplemental Nutrition Assessment Program (SNAP), Temporary Assistance for Needy Families (TANF), Medicaid, Foster Care, and Migrant students.
- Submit person records to the DirectMatch application via Batch mode, manual entry, or by directly sourcing student enrollment data from UniqID Person ID.
- Resolve Near Matches at the LEA level directly through the User Interface.

- Review and Audit match results within the system at any point in time.

- Download results through the User Interface.

Definitions

Important definitions and terminology are described below.

TERM	DESCRIPTION
Batch	A Batch is created in the application when a user submits more than one record at a time using the Person ID or Upload File Match Option. Each Batch created by the application is assigned a Batch ID to uniquely identify the submission.
	Each record in a Batch creates a single Transaction. For example, if an Upload File submission has 5 records a Batch is created with 5 Transactions.
	In all versions prior to Version 2020, Batches were created for all submissions but beginning in Version 2020 only multiple record submissions or submissions via Upload File will be created as a Batch.
Breadcrumb	This is used to reference the navigation path for where the user is located in the application. For example, Home > Match Options indicates that the user is on the Match Options page.
CDF	Customer Defined Field. A System Administrator can configure up to 11 CDFs in the system.
Deterministic Matching	One of many types of matching that is performed during the Match Process. This type of matching typically searches for an exact match between the two records.
Master Index Record	The Index Record is an individual record from the Master Index referencing one unique student.
Local ID	The identifier that is created by the source of the data. For example, if the data is generated by the SIS, the Local ID would be the internal identifier created by that SIS.

Master Index	The Master Index is all unique records in UniqID for the student population. This data is provided by Districts/Schools for students currently enrolled in the location.
Match Candidate	When the application is performing the Match Process, a list of possible Match Candidates will be generated. This is a list of all potentially matching students, but the Match Score is utilized to determine if the Match Candidate is a match or not.
Match Decision	After a Match Score is applied to each Match Candidate, the Match Decision will be generated and can be a Match, No Match or Near Match. Each option is described below in detail.
Match Score	The Match Score will range from 0-100.
Near Match Thresholds	A System Administrator can configure a Lower Near Match Threshold and an Upper Near Match Threshold. This setting determines if a Match Candidate is forced to a Near Match.
Probabilistic Matching	One of many types of matching that is performed during the Match Process. This type of matching measures the probability that two records represent the same person using a statistical approach.
Program Index	Each program that is available in DirectMatch has an Index, which is the individual records associated to the program. For example, the SNAP Index consists of all the SNAP records loaded by the State. This data may contain duplicates, but the primary purpose is to identify all the students that are eligible for that specific program.
SIS	Student Information System. This refers to the local system that the District/School utilizes for student data.
State Batch	When the State submits a match request via the Person ID Match Option, the application creates a State Batch for the grouping of records. In this case, the Program Records in the Program Index are matched against the Master Records
Submission Record	The Submission Record is an individual record from Person ID, Upload File, or Individual Match process that was submitted for matching to be matched against the Program Index.

Transaction	A Transaction is created for each record that is processed by the application. A Transaction is created when an individual record is submitted via Individual Match and for each record in a Batch.

Each record in a Batch creates a single Transaction. For example, if an Upload File submission has 5 records a Batch is created with 5 Transactions.

In all versions prior to Version 2020 Transactions were not used. |

Feature Overview

The table below provides an overview of each feature. Detailed information is provided within the chapters for each feature.

FEATURE	DESCRIPTION
Batch Profile	The Batch Profile provides detailed information about a specific Batch, including the creation date, creation user, and status. The Batch can also be downloaded from this page.
CEP Manager	CEP Manager enables users to view and submit Population and Elections data for the Community Eligibility Provision process. This enables districts to get reimbursed for meal programs based on the percentage of students eligible for free meals.
Home/Dashboard	The Home/Dashboard feature enables users to view Recent Activity for Batches and Transactions.
Match Options – Address Match	The Match Options – Address Match feature enables users to search for potential matches between the SNAP data and Person ID data. The page will list all the potential matches with an option to Match or cancel the potential match. If a record is matched via Address Match, it will be identified as a DC Extended Match.
Match Options – Individual Match	The Match Options – Individual Match feature enables users to enter person details such as Last Name and First Name to match against a selected Match Type. This submission type will progress through the Match Process and will generate a Match Result of Match, No Match, or Near Match.

Match Options – Manual Authorization	The Match Options – Manual Authorization feature enables users to do a manual override by entering a Match Type and Start Date for a specific program. Typically, this would only be used if the student has not matched via one of the other Match Options and there is a verification of program eligibility.
Match Options – Person ID	The Match Options – Person ID Match feature enables users to match eScholar Uniq-ID Person ID data against the selected Match Type. This submission type will progress through the Match Process and will generate a Match Result of Match, No Match, or Near Match for each record.
Match Options – Upload File	The Match Options – Upload File Match feature enables users to upload a file with person records to match against the selected Match Type. This submission type will progress through the Match Process and will generate a Match Result of Match, No Match, or Near Match for each record.
Person Profile	The Person Profile provides detailed information about a specific person, including the Master, Direct Match, and Overview data.
Reports	The Reports feature includes a listing of all the available reports in the application. A System Administrator can enable/disable reports so Reports may not be available to all users.
Search	The Search feature enables users to find a specific student or a group of students. The page includes a search form and a Download option.
Transaction Profile	The Transaction Profile provides detailed information about a specific Transaction, including the creation date, creation user, and status. The Transaction can also be downloaded from this page.
User Profile	The User Profile provides detailed information about a specific user, including the creation date, username, and status.

DirectMatch Flow

The application includes a proven Matching Process that includes 7 steps as outlined below. This process ensures that records are submitted to the application and results are returned to the user.

High Level Process Overview Diagram

SUBMISSION:
Data can be submitted via File Upload, Web Services, Online Entry, SIF, or AFP.

PRE-PROCESS

PRE-PROCESS:
File and data validations are performed to ensure data quality and master data is indexed.

SEARCH

SEARCH:
A search is performed using matching fields such as name, date of birth and address and matching rules are applied.

REFINE

REFINE:
Apply matching rules and perform secondary searches as appropriate.

SCORE

SCORE:
A score is generated for each potential candidate with a 0-100 range and additional matching rules are applied.

RESOLVE

RESOLVE:
The Match Decision is generated as a Match, No Match or Near Match. Near Matches require human intervention.

LINK:
Each person has a unique identifier which can be downloaded or returned via Web Services, SIF or AFP.

Decision Level Flow Diagram
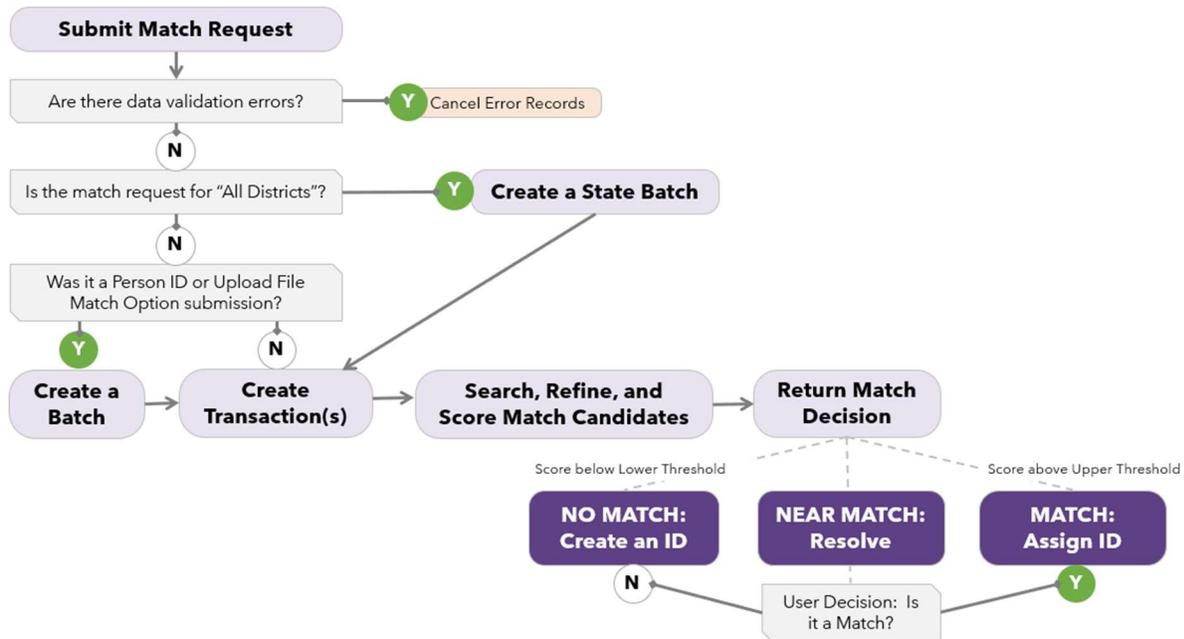
Submit Data (Initiated by a User)

An authorized user can access DirectMatch Match Options to perform a Person ID Match, Upload File Match, or Individual Match. All Person ID match requests utilize the existing s enrollment data to match with the Program Index. Records submitted are considered Submission Records throughout the process.

Pre-Process (Completed by the System)

Once the submission request is received, DirectMatch will verify the file format for the Upload File submissions and will perform data validations. Fields such as Gender will be validated for valid values. If the file contains errors, the records will be canceled by the application. If the submission is successful, the application will create a Transaction for each record in the file/submission and a Batch, if appropriate. (See Batch definition).

Search (Completed by the System)

After all file and data validation is completed, DirectMatch will begin the Match Process. The initial step of the Match Process creates the "Submission Records" to perform matches against the Match Source. The Submission Record source and the Match Source vary by how the request is submitted.

If a District submits the request, a Batch is created and the match is completed using the District data from the Person ID (Uniq-ID), Upload File or Individual Match Record against the Program Index Records. If the State submits the request, a State Batch is created, and the match is completed using the Program Index Records against the Person ID data.

The method for matching in a State Batch is completed by using the Program Index against the Person ID. By searching the Person ID data, the State Batches can be processed more efficiently than searching from Person ID against the Program Index. A Program Index may have 400,000 records, while the Master/Person ID Index may have 1,000,000 or more records. This means that fewer records are submitted through the Matching Process, helping to speed up the processing.

Batch

When a submission was completed by a District or a single district is selected in Match Options, a single District Batch is created. In this case, the application performs a search using the records that were submitted via Person ID, Upload File, and Individual Match and compares the records to the Program Index data. The Submission Record is the record from the Person ID, Upload File, and Individual Match.

State Batch

When a submission was completed by the State or All Districts is selected in Match Options, a State Batch is created. In this case, the application performs a search using the Program Index Records compared to the records that were submitted via Person ID.

Refine (Completed by the System)

During the Refine step, the system will apply Matching Rules, including Force Near Match Rules, Match Thresholds, and others, to identify potential matches. Additional searches

may also be performed during this stage. This step may increase or decrease the number of Match Candidates based on the rules and/or secondary searches.

Score (Completed by the System)

After the system has performed the searches and applied the rules, DirectMatch will score each Match Candidate. The score will range from 0-100.

Resolve (Completed by the System and/or Completed by the User)

During the Resolve step, DirectMatch will decide the Match Decision of Match, No Match, or Near Match based on the Match Score and Match Rules.

ℹ️ The Match Thresholds for determining if a record is a Match, No Match, or Near Match are configured by a System Administrator and may differ for each installation of the application.

Match Threshold Overview

The diagram below illustrates the different match tiers with suggested Match Thresholds. These thresholds may vary for each implantation.

MATCH   **89% - 100%**
Record meets the match threshold based on search criteria and rules. Records can be linked together.

NEAR MATCH   **84% - 88%**
Record is within the near match threshold and a user must review to determine the Match Decision. This threshold is configurable.

NO MATCH   **0% - 83%**
Record does not meet the match threshold and no matching record is available.
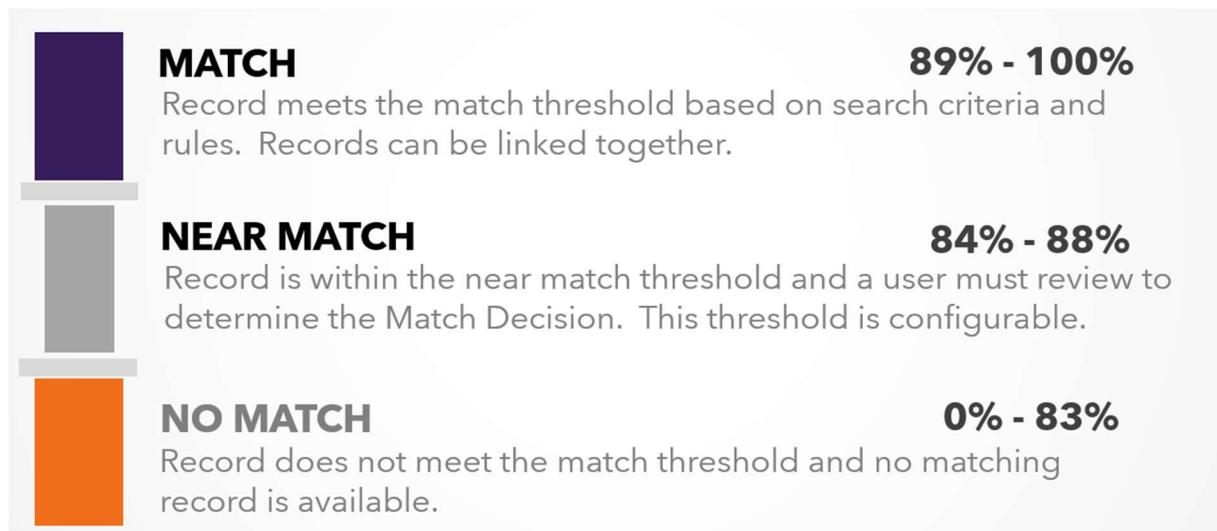
Match

There are two ways a Match decision can be generated.

- The system generates the Match decision during the Match Process
- The user generates the Match decision during the Near Match Resolution Process.

If the result is a Match from the Match Process, the Submission Record matched to one Match Candidate with a Match Score above the Upper Near Match Threshold. In this case, the Submission Record will be linked to the Index Record. A user can also make a Match Decision from the Near Match List or Compare Record page.

No Match

There are two ways a No Match decision can be generated.

- The system generates the No Match decision during the Match Process
- The user generates the No Match decision during the Near Match Resolution Process.

If the result is a No Match, the Submission Record did not match to any Match Candidates, indicating there were no Match Candidates above the Lower Near Match Threshold. A user can also make a No Match Decision from the Near Match List or Compare Record page.

Resolve Near Matches

If the result is a Near Match, the Submission Record matched to one or more Match Candidates with a Match Score between the Lower Near Match Threshold and the Upper Near Match Threshold. Only the system can resolve to a Near Match. When a Near Match decision is made by the system, a user must intervene and make a Match or No Match decision or must cancel the Submission Record.

Link (Completed by the System)

When records are matched by the system or a user, the Submission Record will be linked to the Index Record and will be identified as a match for the specified program.

Security

All users must have a registered and active account to log into DirectMatch. The authorized user must create the account and the user must complete the account setup process before the user can log in.

DirectMatch utilizes an email address to uniquely identify a user. LDOE is the authorized user when accounts are created for the district's security coordinator. At the district level, the security coordinator is the authorized user who will create accounts for users within the district.

DirectMatch employs feature level restrictions and data level restrictions which may alter the experience in the application for the user. Feature Authorization and Data Authorization are controlled by the System Administrator.

Feature Authorization

Each user is assigned to a role or multiple roles by a System Administrator. These roles are granted permissions to specific features and privileges. The application includes over 15 roles, allowing administrators to control access to features. For example, Match Options File Upload may not be enabled for all user roles.

If a feature is described in this document, but not visible in the application to you, your role assignment may not include the permissions to that feature.

Data Authorization

Each user is assigned to one or many districts and schools. The application enables System Administrators to grant access to data by location (District/School). A user is restricted to uploading and editing students that are assigned to the same locations. For example, a user assigned to District A cannot upload data on students for District B.

System Requirements

The application utilizes Adobe Acrobat and Microsoft Excel for reports provided in the application. Users should download Adobe Acrobat from http://get.adobe.com/reader/. Microsoft Excel or an Excel reader can be used.

🔖 About Version 2020

Chapter Highlights

- [What's New in Version 2020](#)
- [Version Comparisons](#)

What's New in Version 2020

DirectMatch Version 2020 includes many of the same concepts as Version 11, but some features have been renamed and added to the application. The user interface was also refreshed and enhanced. The differences between Version 11 and Version 2020 are described below.

New Features

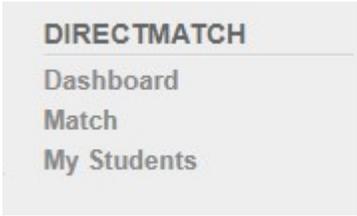| FEATURE	DESCRIPTION
Manual Authorization	This new feature enables authorized users to complete a manual override/insertion of program data for a specific student. If a student is eligible for a program but does not match to the data via one of the matching methods, a user can insert the program data for the student. All Manual Authorizations are tracked so that the records can be identified as a manual entry.
Address Matching	This new feature enables authorized users to perform an DC Extended Match from SNAP matched students to Person ID using address data. When a student is matched for SNAP, the address will be available within Address Matching. The application will display the matching address and any students residing at the same address.
CEP Manager	This new feature enables authorized users to review and submit CEP data to the State.
Recent Activity	This new feature enables users to view their most recent match request activity in the application. For example, the 5 most recent

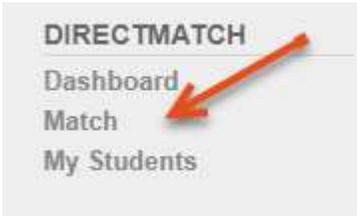| FEATURE	DESCRIPTION
	pending records and complete records will be available from the Home / Dashboard page.
Match History	This new feature enables users to view all their match request activity in the application.

Naming Convention/Feature Name Changes

VERSION 11	VERSION 2020	FUNCTION
My Students	Search	Enables users to search for and view a list of students eligible for a program and to download the data.
Online Entry	Individual Match	Enables users to enter one student at a time into the match process for a specific program.

Version Comparisons

Menu/Navigation Options

FUNCTION	VERSION 11	VERSION 2020
Navigation Menu		
Accessing the DirectMatch Dashboard/Home Page		

FUNCTION	VERSION 11	VERSION 2020
Accessing the Match process	DIRECTMATCH Dashboard Match My Students	
Accessing Search/My Students	DIRECTMATCH Dashboard Match My Students	
Download Batch	File Format 3.0+ DOWNLOAD	Actions Download View Transaction Details
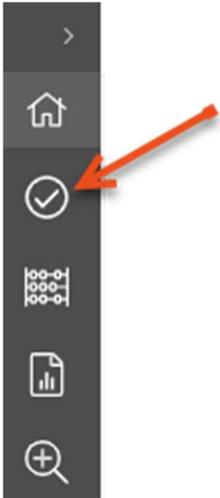
FUNCTION	VERSION 11	VERSION 2020
Download Students	DOWNLOAD OPTIONS	

Dashboard/Home Page

Version 11

Version 2020

Recent Activity   ⟳ »

TRANSACTIONS BATCHES

Pending - 5 Most Recent   View Past 7 Days │ View All »

	Transaction Info	Match Type	Location Info	Process Info	Batch ID	Status Info	Actions	
⚠	924 File	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/06/2020 3:00 PM	925	▬▬ ▬ ▬ ▬ Pending: Request Received	Refresh	⋮
⚠	905 File	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/05/2020 3:00 PM	922	▬▬▬ ▬ ▬ Pending: In Progress	Refresh	⋮
⚠	902 File	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/05/2020 3:00 PM	921	▬▬ ▬ ▬ ▬ Pending: Request Queued	Refresh	⋮
⚠	893 Person ID	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/03/2020 3:00 PM	918	▬▬▬▬▬ Pending: Near Matches	Resolve	⋮
⚠	885 Person ID	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/02/2020 3:00 PM	918	▬▬▬ ▬ ▬ Pending: Errors	View	⋮

Completed - 5 Most Recent   View Past 7 Days │ View All »

Transaction Info	Match Type	Location Info	Process Info	Batch ID	Status Info	Actions	
927 Web Services	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/06/2020 3:00 PM	921	▬▬▬▬▬ Completed		⋮
916 Person ID	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/06/2020 3:00 PM	918	▬▬▬▬▬ Completed		⋮
887 File	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	04/03/2020 3:00 PM	925	▬▬▬▬▬ Completed		⋮
825 File	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	03/29/2020 3:00 PM	925	▬▬▬▬▬ Completed		⋮
823 Individual	SNAP	**Acadia Parish** (027) *Brownfields Elementary School (027018)*	03/29/2020 3:00 PM		▬▬▬▬▬ Completed		⋮

Match Options

Version 11

Version 2020

My Students/Search

Version 11

Version 2020

▐ Getting Started

Chapter Highlights

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- [Side Navigation](#)
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- [Actions/Icons](#)
- [Footer](#)

Overview

This User Guide can be used by DirectMatch users to better understand how the application works. The guide includes an overview of each feature, screenshots, and lessons for specific actions.

The guide includes this Getting Started chapter and is then split into a chapter per core feature. Each chapter will include a "Chapter Highlights" with bookmarks/links to the sub-sections within the chapter.

The guide will also include alerts/messages, including:

> **i** This indicator is used to highlight an important fact or detail about a feature or process.

This indicator is used to describe/define a specific term or reference that is used.

Logging In

To log into DirectMatch a System Administrator must create an account for you. When the account is created by the System Administrator, you will receive an email from DirectMatch prompting you to complete the account setup process, including adding your password. Once the account setup process has been completed, you can log into the application.

The account setup email will include the DirectMatch URL (https://SecureID.ldoe.la.gov/), but you can also check with your System Administrator for the URL. When the DirectMatch URL is accessed, the application will display a Log In screen as shown below.

DirectMatch has specific rules for a password to ensure the security of the account. The password must meet the following rules:

- At least 1 lowercase letter.
- At least 1 uppercase letter.
- At least 1 number.
- At least 1 special character (!@#$%*^&).
- Must be 5 to 15 characters.

Lesson: How to Log In

1. Access the DirectMatch URL. (https://SecureID.ldoe.la.gov/)
2. Enter the email address. The email address is the username.
3. Enter the password.

Log in to your account

Enter Email Address

abbyjones@millroad.edu

Enter Password

☑ Remember Me

Log In

Lost your password?

4. Click the Log In button.

5. The application will authenticate the email and password entered on the form. If the user is authorized to access the application, the DirectMatch Dashboard will be displayed for the authenticated user.

   a. If the email or password is invalid or the user does not otherwise authenticate, an error will be returned on the Log In page.

eScholar Uniq-ID®

🚫 Error Logging In

Enter Email Address

Jayanthi.Sothirajah@la.gov

Enter Password

•••••••••

☐ Remember Me

Log In

Lost your password?

Resetting a Password

If you lose your password or cannot remember it, DirectMatch enables users to reset their password by clicking the "Lost your password?" link on the Log In page.

Lesson: How to Reset a Password

1. Access the DirectMatch URL (https://SecureID.ldoe.la.gov/)

2. Click the Lost your password? Link on the Log In page.

3. The application will display the Lost Password page which includes instructions for resetting the password.

4. Enter your email address.

5. Click the Send Reset Link button.

6. When the Send Reset Link button is clicked by the user, the application will email a password reset link to the email address supplied in the form.

7. Follow the instructions in the email to complete the process.

    a. If you do not receive the email, please be sure to check your Junk Mail.

Lost Password

Follow these steps to reset your account.

1. Enter your email address
2. Check your email and click on the password reset link
3. Follow the instructions and reset your password

Enter Email Address

Send Reset Link

< Back to Log In

User Interface Overview

The user interface is responsive and can be viewed on a web browser, mobile device, or tablet by an authorized user. The information below describes the user interface components to help users to understand how to navigate the application.

The user interface is divided into the following categories: Main Header, Side Navigation, Main Content Area, and Footer.

All screenshots shown in this document contain fake data. No real student data is displayed in any of the screenshots.

Main Header (Main Navigation)

The Main Header of the application includes the application name, an application picker, user information, breadcrumb section, and page actions.

Application Picker

The Application Picker will allow authorized users to switch between the eScholar Uniq-ID® applications, including Location ID, DirectMatch, and Person ID. The Application Picker will only list the applications that the user is authorized to access.

User Information

The User Information section includes the name of the user and a person icon. The person icon enables access to the user details menu which includes the email address, phone number, roles, and groups for the user and a Sign-Out link. If authorized the user can click the Edit Icon ( ) to update profile details.

Icon/Image(s)	Description
Robert Smith 👤	Lists the full name of the user.

	Displays user first and last name, email address, and phone number (if available) and includes a Sign-Out button. The Edit icon ( ) will be available for users who can edit User Profiles.

Breadcrumbs (Navigation Path)

The breadcrumbs provide the path/location of where the user is in the application and offers clickable links to return to previous pages.
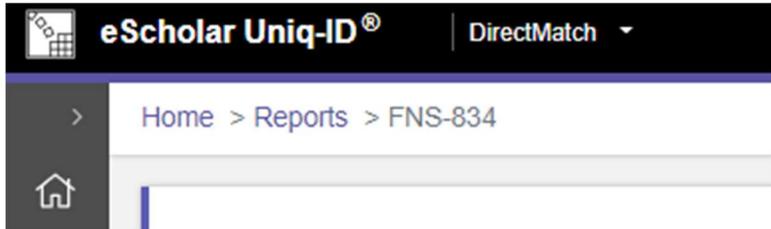
Side Navigation

The Side Navigation menu provides easy access to all the core functions within the application. The menu can be expanded or collapsed using the > icon. Each navigation option is described in more detail below.

Collapsed Menu	**Expanded Menu**
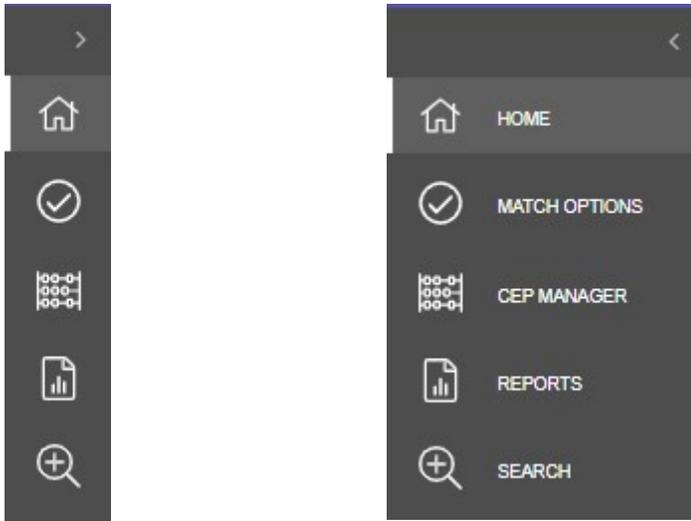
Menu Options

Depending on feature authorization, the following menu options will be available. If an icon is not available, the permissions to the feature are not available to the user role.

Icon(s)	Feature	Description
	Home/Dashboard	Refer to the "Dashboard".
	Match Options	Refer to "Match Options".
	CEP Manager	Refer to "CEP Manager".
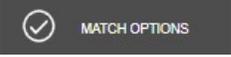
	Reports	Refer to the "Reports".
REPORTS		
SEARCH	Search	Refer to the "Search Options".
SIGN OUT	Sign Out	When the Sign Out icon is clicked, the application will log the user out of their session and return to a Log In page.
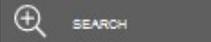
Main Content Area

The Main Content Area of the application displays the specific data, functions and options that are available for the selected component/navigation item. This may include panels, data grids, charts, and actions.

Panels

Panels consist of an arrangement of information grouped together such as the Recent Activity panel on the Home page.

Data Grids

Data grids have a column/tabular view of data and allows for sorting and filtering on the columns.

	Transaction Info ⇕	Match Type ⇕	Location Info ⇕	Process Info ⇕	Batch ID ⇕	Status Info ⇕	Actions
⚠	924 File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	925	Pending: Request Received	Refresh ⋮
⚠	905 File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	922	Pending: In Progress	Refresh ⋮
⚠	902 File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	Pending: Request Queued	Refresh ⋮
⚠	893 Person ID	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	918	Pending: Near Matches	Resolve ⋮
⚠	885 Person ID	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	Pending: Errors	View ⋮

Data Lists

Data lists contains views of data in a list or non-tabular format. It does not typically allow for sorting but may include filtering.
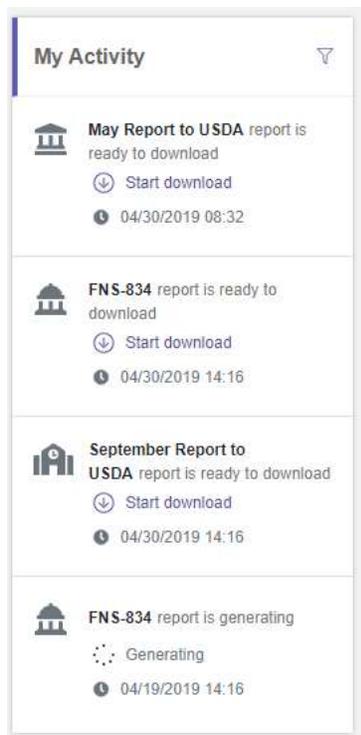
Charts

Charts such as the Near Match Score Chart are a graphical representation of the data.

A System Administrator can customize field labels in the application, therefore some field names in this document may vary from the field labels displayed in the application.

Actions/Icons

The action icons facilitate user navigation and operations within the application.

Icon(s)	Name	Navigates To
»	Drill In	Navigates to the next level detail screen.
«	Drill Back	Navigates back to the previous screen.
⋮	Multiple Actions	When there are more than 2 actions available, this icon may be used. When clicked, it will display a drop-down menu which includes all the available actions. The actions within the menu should be clicked to initiate the action.
✎	Edit	Edits the details of a location, group, rule, system property or user.
🗑	Delete or Remove	Remove a location from a group or delete a user from the system.
▷	Next	View the next panel or screen.

◁	Previous	View the previous panel or screen.
▽	View Details	Show more details.
△	Hide Details	Show fewer details.
⊕	Start Downloads	Begin downloading the report.
↻	Refresh	Refreshes the data grid, list, or panel with the most updated information.
↕	Sort	Sorts the column in the list/grid. Clicking 1-time sorts ascending order and clicking 2 times sorts in descending order.
⚠	Alert	Indicates an alert/message for the user.

Lesson: How to Sort Data

1. Click on the Sort icon (↕) to the right of the column name to be filtered.
2. The application will sort the data grid.
3. To reverse the sort, click the Sort icon (↕) to the right of the column name again.

Lesson: How to View Records Using Pagination

1. If there are more than 25 records are available in the data grid, the application will include a pagination function at the bottom of the data grid.
2. To paginate, click the numbered buttons, Next or Previous buttons.

1 - 25 of 38   Previous 1 2 Next

Footer

The Footer of the application displays the application version and eScholar copyright information.

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🔖 Dashboard

Chapter Highlights

- Overview
- District/State Summary Panel
- Recent Activity Panel
- Quick Tips

Overview

The Dashboard is the landing page for the DirectMatch application and provides users with quick access to the Transactions/Batches. Once a user successfully logs into the application, the Dashboard/Home Page will be displayed depending on their user role. If a feature is not visible, the permission to that feature may not be enabled.

The main goal of this page is to enable quick access to recently processed Transactions or Batches and for next steps. From the Dashboard, users can easily access the next steps, such as resolving near matches, downloading data, viewing Transaction information, or reviewing statuses.

The screenshot below displays the Dashboard including the Summary Panel, Recent Activity Panel, Quick Tips Panel, and the actions that are available from this page. Please read each section below for more details.

District/State Summary Panel

Summary displayed on the Dashboard includes:

LEA Users

When the user is an LEA-based user, the application will display the District Summary Panel which includes the count of Schools that the user has access to in the application.

District Summary
Schools
135
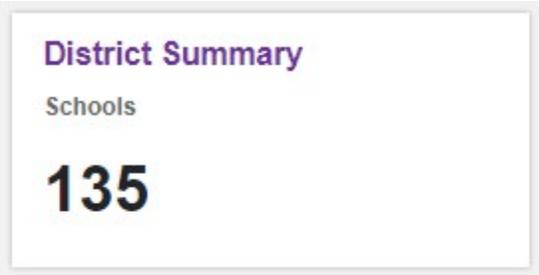
State Users

When the user is a State-based user, the application will display the State Summary Panel which includes the count of Districts that the user has access to in the application.

State Summary
Districts
44
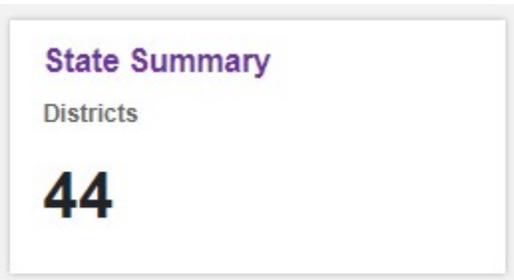
Recent Activity Panel

Recent Activity displayed on the Dashboard includes a Refresh Action Button, Drill into Action Button, Transaction Tab, and a Batch Tab. The Panel and Grid Action Buttons enable the user to perform specific actions related to the Recent Activity Panel as described below. The Transaction Tab displays all the individual records that were processed by the application, while the Batch Tab lists all the Batches that were processed by the application. A Batch is a group of Transactions that were requested at one time via a File Upload or a Person ID Match Options submission.

Panel Action Buttons/Links

ICON	ACTION	DESCRIPTION
	Refresh	When clicked, the Refresh button icon will refresh the Recent Activity Panel with the latest Transactions/Batches and Statuses.
	Drill In	When clicked, the Drill In button icon will navigate to the Match History page. Refer to the Match History page for more information.
View Past 7 Days	View Past 7 Days	When clicked, the "View Past 7 Days" link will navigate to the Match History page with a view of the past 7 days. Refer to the Match History page for more information.
View All »	View All	When clicked, the "View All" link will navigate to the Match History page with a view of all Transactions (Pending or Completed). Refer to the Match History page for more information.

Transactions Tab

The Transaction Tab includes all individual Transactions that the user is authorized to access. The Recent Activity Panel is grouped into two sub-sections: Pending – 5 Most Recent and Completed – 5 Most Recent. The Pending section will list any Transaction that is not in the "Completed" status, while the Completed section will include all Transactions that are in the "Completed" status.

? REFRESHER: A Transaction is created for each record that is processed by the application. A Transaction is created when an individual record is submitted via Individual Match and for each record in a Batch.

The table below describes each of the fields/columns available in the Transaction Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon ⚠️	If a Transaction is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.
Transaction Info	Transaction ID Submission Type	Includes the Transaction Reference ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. The Transaction ID will be a hyperlink to the Transaction Info page.
Match Type	Program/Match Type	Includes the Match Type, such as SNAP, TANF or other Match Type.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Batch ID	Batch ID	If the Transaction is associated to a Batch, the Batch ID will be listed and will be a hyperlink to the Batch Info page.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Transaction and the text of the Status.

Actions		⋮ Dropdown Menu: Click to view more actions
		
		    o Continue
		    o Refresh
		    o Resolve
		    o View
		    o Download
		    o View Transaction Details

Batch Tab

The Batch Tab includes all the Batches that the user is authorized to access. The Recent Activity Panel is grouped into two sub-sections: Pending – 5 Most Recent and Completed – 5 Most Recent. The Pending section will list any Batch that is not in the "Completed" status, while the Completed section will include all Batches that are in the "Completed" status.

	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
⚠ 925 UID_3.csv File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Request Received	Refresh ⋮
⚠ 922 UID_5.csv File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh ⋮
⚠ 921 UID_38.csv File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	Pending: Request Queued	Refresh ⋮
⚠ 920 UID_39.csv File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve ⋮
⚠ 918 Person ID	SNAP	State Batch	04/02/2020 3:00 PM	1000 of 190,002 PENDING	Pending: Near Matches	Resolve ⋮

Completed - 5 Most Recent

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
1002 Person ID	SNAP	East Baton Rouge Parish (017) All Schools	04/06/2020 3:00 PM	1,000 of 1,000	Completed	⋮
1001 Person ID	SNAP	Acadia Parish (027) All Schools	04/06/2020 3:00 PM	2,000 of 2,000	Completed	⋮
926 Person ID	TANF	State Batch	04/06/2020 3:00 PM	190,002 of 190,002	Completed	⋮

REFRESHER: A Batch is created in the application when a user submits more than one record at a time using the Person ID or Upload File Match Option. Each Batch created by the application is assigned a Batch ID to uniquely identify the submission.

The table below describes each of the fields/columns available in the Batch Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon ⚠	If a Batch is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.
Batch Info	Batch ID File Name Submission Type	Includes the Batch Reference ID number, File Name, and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. The Batch ID will be a hyperlink to the Batch Info page.
Match Type	Program/Match Type	Includes the Match Type, such as SNAP, TANF or other Match Type.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Record Info	Count of records in the current Batch Status	Includes counts to help determine progress of the Batch. The Status will indicate the current Status of the Batch.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
	Count of total records in the Batch Status	
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Batch and the text of the Status.

Actions		Dropdown Menu: Click to view more actions
		   o Continue
		   o Refresh
		   o Resolve
		   o View
		   o Download
		   o View Batch Details

Next Action Buttons/Links

Each Transaction/Batch will also include an Actions column which will direct the user to the next steps within the application. If the Transaction/Batch is in the Pending section, a next action link will be available. This next action will navigate the user to the appropriate action for that Transaction/Batch.

ACTION	DESCRIPTION
Continue	Enables the user to continue a Transaction/Batch that is in a pause status.

Download	Enables to user to access the Transaction/Batch Info page that provides download capabilities.
Refresh	Enables the user to refresh the status of the Transaction/Batch.
Resolve	Enables the user to resolve the pending near matches for the Transaction/Batch.
View	Enables the user to view the Transaction/Batch Information Profile.

Quick Tips

Quick Tips displayed on the Dashboard includes link buttons to Match Options and CEP Manager. When the buttons are clicked, the application will navigate to the features like the link buttons on the side navigation.
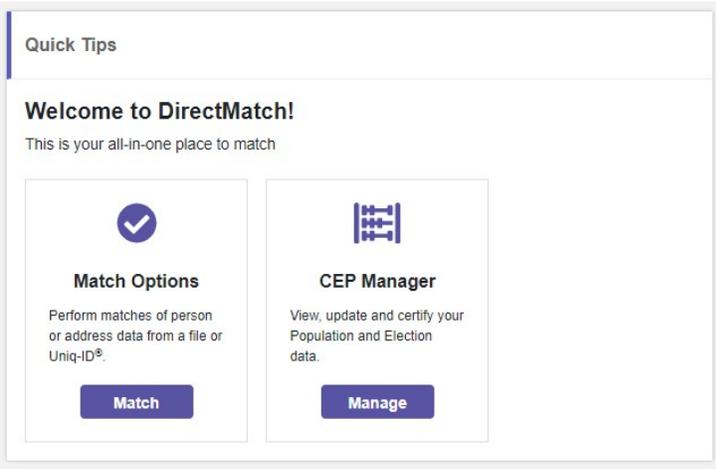
Lesson: How to Refresh Recent Activity Data

1. On the Dashboard, find the Recent Activity panel.

a. To access the Dashboard, click the Dashboard/Home Icon (   ) if it is not already selected.

2. Click on Refresh Icon (   ) on the Recent Activity panel header.

3. The Recent Activity panel will update the status information for the pending Transactions or Batches.

a. When the refresh is completed, some Transactions or Batches may transition to the Completed stage and will be displayed in the Completed section.
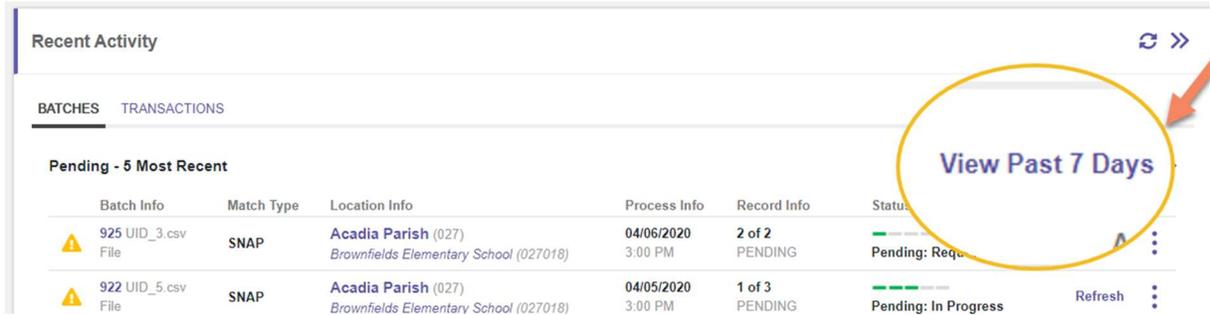
Lesson: How to Drill into Match History

1. On the Dashboard, find the Recent Activity panel.
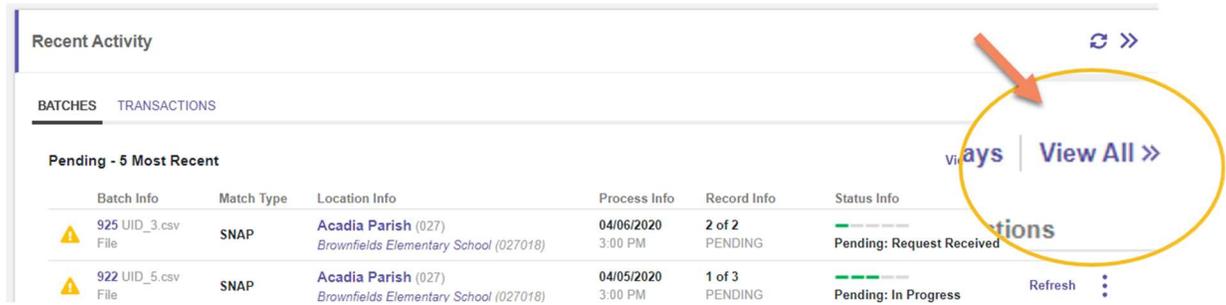
2. Click on Drill in Icon on Recent Activity panel header.

a. Click on "View Past 7 Days" Pending/Completed.

b. Click on "View All >>" Pending/Completed.

3. The application will display the Match History page.
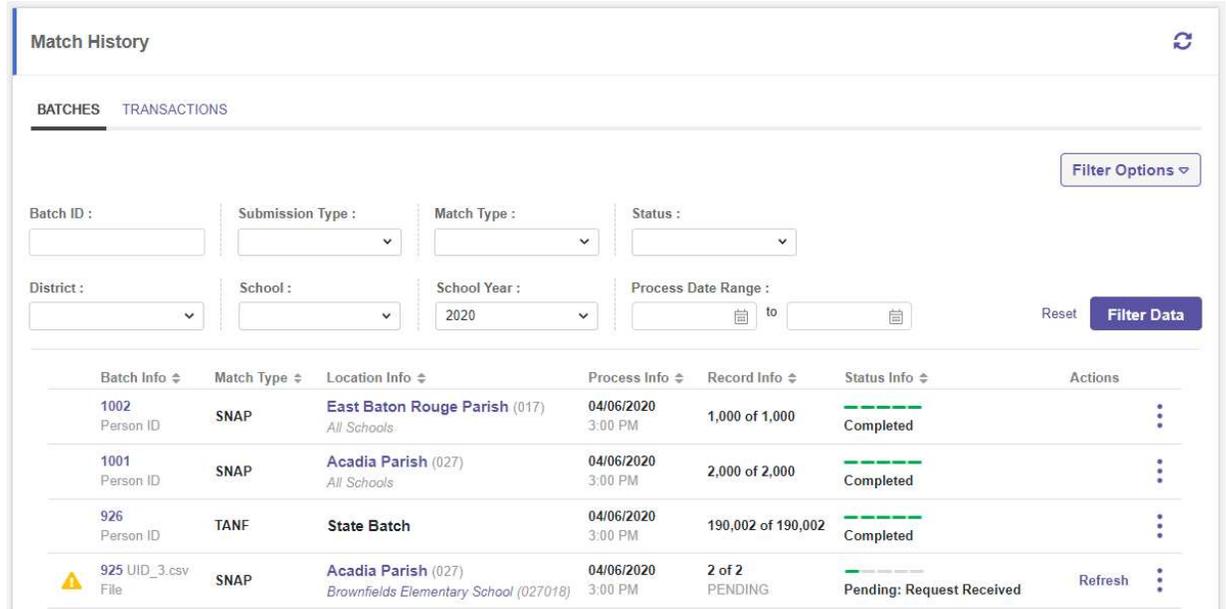
a. The application will default to the current year for the School Year filter and will also default to the past 30 days in the Process Date Range filter.

b. If a Batch or Transaction was not selected by the user on the prior page, the application may display a message indicating the user must enter a Batch ID or Transaction ID. If so, enter a valid Batch ID or Transaction ID and click the Filter Data button.

Batch ID or Transaction ID must be entered to view results.

Lesson: How to Drill into the Near Match List Page

1. On the Dashboard, find the Recent Activity panel and click on the "Resolve" action link or click on the Multiple Actions icon (⋮) to initiate the Action Menu.

2. Click on Resolve.

3. The application will display the Near Match List page which includes a filter and a list of all the Near Matches applicable to the prior selection.

4. View the Near Match List page.

Lesson: How to Drill into the Transaction Profile

1. On the Dashboard, find the Recent Activity panel.

2. Click on the Transaction under Transaction Info column.

3. The application will display the selected Transaction Profile.

4. From this view, the user may have the option to view Process and General Details or to perform next actions such as Download or View Batch Information.

Lesson: How to Download a Transaction from the Transaction Profile

1. On the Dashboard, find the Recent Activity panel.

2. Click on the Transaction under Transaction Info column.

3. The application will display the selected Transaction Profile.

4. From this view, click the Download Tab in the Transaction Profile Header or the Download button in the Next Steps panel.

5. The application will display the Download Tab page which includes the Download Options form and a Download History panel.

6. To extract/download the data, select the Match Status and Format options.

7. Click the Generate Extract button.

8. The application will start the download and download using the web browser default download process.

Lesson: How to Drill into the Batch Profile

1. On the Dashboard, find the Recent Activity panel.

2. Click on the Batches Tab.

3. Click on the Batch ID in the Batch Info column.

4. The application will display the selected Batch Profile.

5. From this view, the user may have the option to view Process and General Details or to perform next actions such as Download or View Batch Information.

Lesson: How to Drill into the Location Profile

1. On the Dashboard, locate the Recent Activity panel and click on the District/School link under Location Info column.

2. The application will display the Location Profile.

3. From this view, the user can view General Location and Contact Details about the selected Location.

🔖 Match History

Overview

The Match History page enables users to view all Transactions or Batches that have been processed, Refresh the page, filter, sort, and perform actions on the Transactions/Batches. Users can view the Transactions and Batches based upon the Data Authorization rules, such as the associated locations.

Filter

The Filter Option on the Match History page enables filtering of the Transactions data grid to help find a specific Transaction or group of Transactions. The Filter Options are described below:

OPTION	DESCRIPTION
Filter Options ⌃	When this button is displayed (arrow pointing up), the Filter Options are collapsed. To view the Filter Options, click the Filter Options button.
Filter Options ⌄	When this button is displayed (arrow pointing down), the Filter Options are expanded. To collapse the Filter Options, click the Filter Options button.
Reset Filter Data	When the Filter Options is expanded a Reset link and a Filter Data button will be displayed. To reset the filter criteria, click the Reset link. To filter the data grid based on the selected criteria, click the Reset Data button.

The following filter criteria is available in Filter Options:

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
Transaction ID	Transaction ID :	Each Transaction is assigned a unique Transaction identifier. This filter field will restrict the results to the specific Transaction ID entered in this field. This option is not available on the Batches Tab. To filter on a Transaction ID, enter the ID in the Transaction ID field.

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
Batch ID	Batch ID :	Each Batch is assigned a unique Batch identifier. This filter field will restrict the results to the specific Batch ID entered in this field. To filter on a Batch ID, enter the ID in the Batch ID field.
Submission Type	Submission Type : ☐ File ☐ Individual Match ☐ SLF ☐ Edit ☐ WebService ☐ Automation Clear	The Submission Type filter will list all the Submission Type options available to the user. This may include: ▪ File ▪ Individual Match ▪ SLF ▪ Edit ▪ Web Services ▪ Automation To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
Match Type	Match Type : ☐ TANF ☐ SNAP	The Match Type filter will list all the Match Type options available to the user. This may include: ▪ SNAP ▪ TANF

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
		To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.

Status	Status :
	[ ] Completed
	[ ] Errors
	[ ] In Progress
	[ ] Interrupted
	[ ] Near Matches
	[ ] Request Queued
	[ ] Request Received
	Clear
	t Received
		The Status filter will list all the Status options. This may include:
		
		  ▪ Completed
		
		  ▪ Errors
		
		  ▪ In Progress
		
		  ▪ Near Matches
		
		  ▪ Request Queued
		
		  ▪ Request Received
		
		To filter on one or more of the options, click the selection box(es) to the left of the name.
		
		To clear all selected options, click the Clear link.

District	District :	The District filter will list up to 25 Districts the user is authorized to view. This filter option also includes a search feature.

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
	District : Acadia Parish (027) East Baton Rouge Parish (017) East Carroll Parish (035) Franklin Parish (041) Grant Parish (043) Jackson Parish (049) Jefferson Parish (051) Lafayette Parish School Board (02: Livingston Parish (045) Madison Parish (089) Display 25 of 28 records Search to find additional locations. Clear	To filter on one or more of the options, click the selection box(es) to the left of the name. To search for a specific district, enter at least 3 letters of the district name or code in the search field. To clear all selected options, click the Clear link.
School	School : School : School Year : 2020 Alice Harte Elementary Charter School (017082) Acadia Parish (027) Benjamin Franklin Elementary Math and Science ... (01701 Acadia Parish (027) Brownfields Elementary School (017016) Acadia Parish (027) Cedarcrest-Southmoor Elementary School (017022) Acadia Parish (027) Clairborne Elementary School (017026) Acadia Parish (027) Display 25 of 28 records Search to find additional locations. Clear	The School filter will list all the Schools the user is authorized to view. This filter option also includes a search feature. To filter on one or more of the options, click the selection box(es) to the left of the name. To search for a specific school, enter at least 3 letters of the school name or code in the search field. To clear all selected options, click the Clear link.
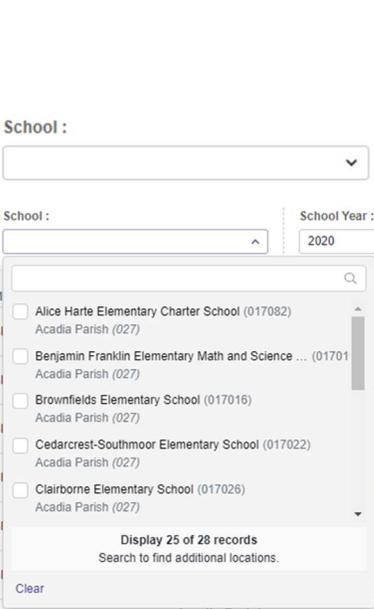
FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
School Year	School Year : 2020 ☑ 2020 ☐ 2019 ☐ 2018 ☐ 2017 Clear	The School Year filter will list all the School Year options. Defaults to the current School Year. To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
Match Date	Process Date Range : to Process Date Range : to July 2021 Su Mo Tu We Th Fr Sa 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 Today	The Process Date Range filter includes a date range choice for the Start Data and End Date. This will filter the results based on when the Match Date was recorded by the system. Defaults to the past 30 days unless changed by the user. To enter a data, click the Calendar icon and select a data or manually enter a valid date. Click the "Today" link to set the date to the current date.
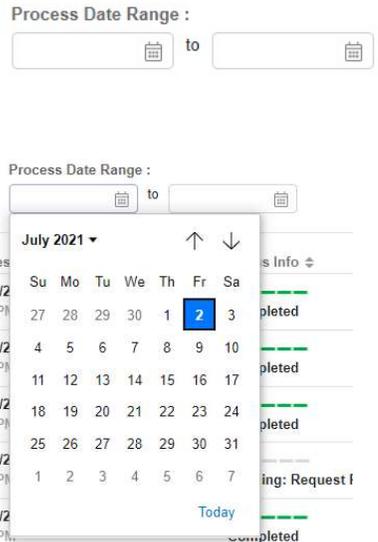
When filter criteria are entered/selected and the Filter Data button is clicked by the user, the data displayed in the Transaction Tab and/or Batch Tab will be filtered by the system based upon the selections.

Transactions Tab

The Transaction Tab includes all individual Transactions that the user is authorized to access. The table below describes each of the fields/columns available in the Transaction Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon ⚠️	If a Transaction is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.
Transaction Info	Transaction ID Submission Type	Includes the Transaction Reference ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. The Transaction ID will be a hyperlink to the Info page.
Match Type	Program/Match Type	Includes the Match Type, such as SNAP, TANF, Medicaid or other Match Type.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Batch ID	Batch ID	If the Transaction is associated to a Batch, the Batch ID will be listed and will be a hyperlink to the Batch Info page.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Transaction and the text of the Status.

Actions		• Dropdown Menu: Click to view more actions
		   o Continue
		   o Refresh
		   o Resolve
		   o View
		   o Download
		   o View Transaction Details

Next Action Buttons/Links

Each Transaction/Batch will also include an Actions column which will direct the user to the next steps within the application. If the Transaction/Batch is in the Pending section, a

next action link will be available. This next action will navigate the user to the appropriate action for that Transaction/Batch.

ACTION	DESCRIPTION
Continue	Enables the user to continue a Transaction/Batch that is in a pause status.
Download	Enables the user to access the Transaction/Batch Info page that provides download capabilities.
Refresh	Enables the user to refresh the status of the Transaction/Batch.
Resolve	Enables the user to resolve the pending near matches for the Transaction/Batch.
View	Enables the user to view the Transaction/Batch Information Profile.

Batch Tab

The Batch Tab includes all the Batches that the user is authorized to access. The table below describes each of the fields/columns available in the Batch Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon ⚠️	If a Batch is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Batch Info	Batch ID File Name Submission Type	Includes the Batch Reference ID number, File Name, and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match.
Match Type	Program/Match Type	Includes the Match Type, such as SNAP, TANF or other Match Type.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile. If it is a state batch, it will be displayed "State Batch" text.
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Record Info	Count of records in the current Batch Status Count of total records in the Batch Status	Includes counts to help determine progress of the Batch. The Status will indicate the current Status of the Batch.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Batch and the text of the Status.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION

Actions		• Dropdown Menu: Click to view more actions
		    o Continue
		    o Refresh
		    o Resolve
		    o View
		    o Download
		    o View Transaction Details

Next Action Buttons/Links

Each Transaction/Batch will also include an Actions column which will direct the user to the next steps within the application. If the Transaction/Batch is in the Pending section, a next action link will be available. This next action will navigate the user to the appropriate action for that Transaction/Batch.

ACTION	DESCRIPTION
Continue	Enables the user to continue a Transaction/Batch that is in a pause status.
Download	Enables the user to access the Transaction/Batch Info page that provides download capabilities.
Refresh	Enables the user to refresh the status of the Transaction/Batch.
Resolve	Enables the user to resolve the pending near matches for the Transaction/Batch.
View	Enables the user to view the Transaction/Batch Information Profile.

Lesson: How to Filter the data

1. Expand the Filter Options by clicking the Expand Filter Options button.

    Filter Options ▲

2. Enter or select the filter criteria.

3. Click the Filter Data button to filter the data grid results.
4. To clear the filter options, click the Reset link.

Lesson: How to Refresh Match History Data

1. On the Match History, locate the Match History panel.

2. Click on Refresh Icon (⟳) on the panel header.

3. The application will refresh the results displayed in the data grid.

Match History							

BATCHES   TRANSACTIONS

Filter Options ▽

Batch ID :

Submission Type :

Match Type :

Status :

District :

School :

School Year :
2020

Process Date Range :
to

Reset   **Filter Data**

Batch Info ⇕	Match Type ⇕	Location Info ⇕	Process Info ⇕	Record Info ⇕	Status Info ⇕	Actions
1002 Person ID	SNAP	East Baton Rouge Parish (017) All Schools	04/06/2020 3:00 PM	1,000 of 1,000	– – – – – Completed	⋮
1001 Person ID	SNAP	Acadia Parish (027) All Schools	04/06/2020 3:00 PM	2,000 of 2,000	– – – – – Completed	⋮
926 Person ID	TANF	State Batch	04/06/2020 3:00 PM	190,002 of 190,002	– – – – – Completed	⋮
⚠ 925 UID_3.csv File	SNAP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	– – – – – Pending: Request Received	Refresh ⋮

Lesson: How to Access the Resolve Near Match Process

1. Locate a Pending: Near Match Transaction/Batch in the Match History panel.
2. Click on the Resolve link.
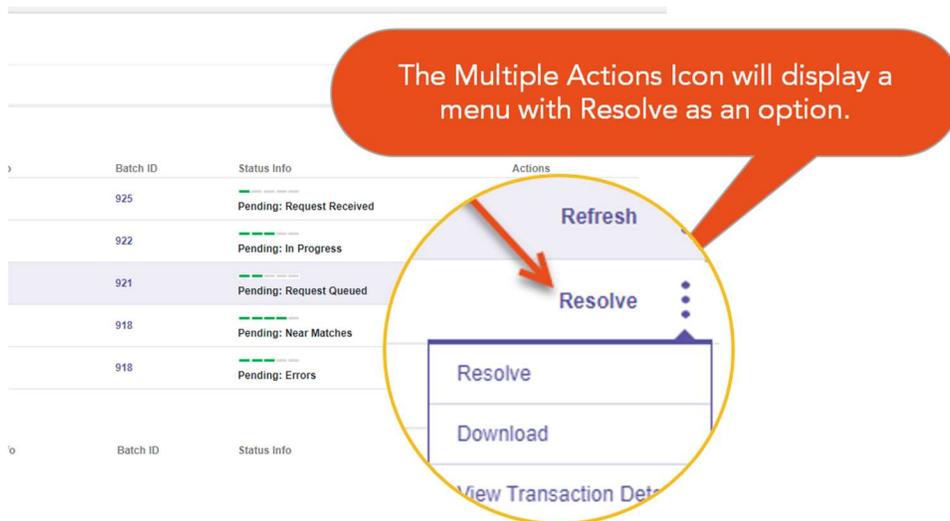
3. The application will display the Near Match List page.
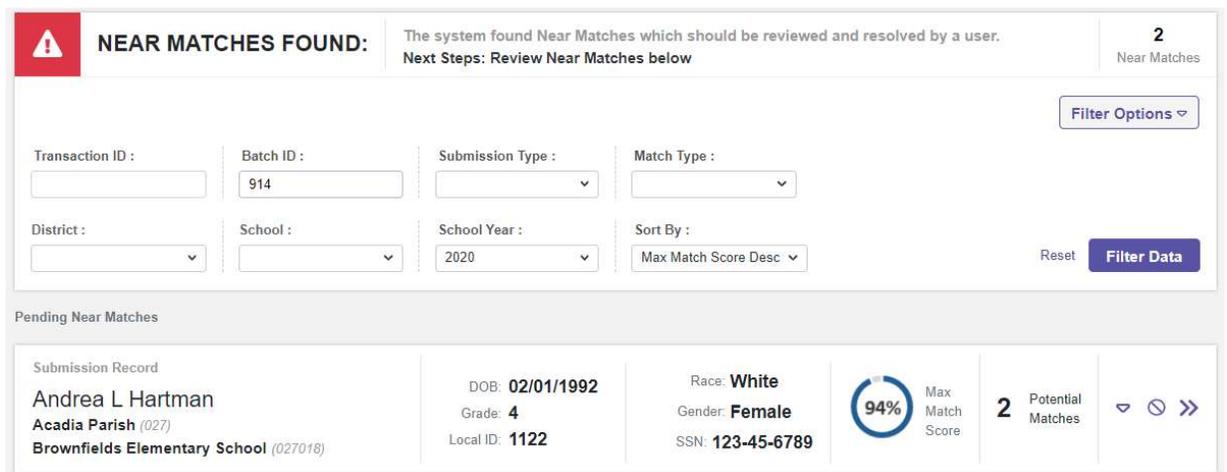
4. For more instructions on how to resolve Near Matches, refer to the Resolving Near Match lessons.

Lesson: How to Drill into Transaction Profile

1. Locate the Transaction in the Match History panel to be viewed.

2. Click on the Multiple Actions icon button (⋮).

3. The application will display a Multiple Action Menu.

   a. Refer to Next Actions details above.Next Action Buttons/Links

4. Click on the View Transaction Details link to access the profile.
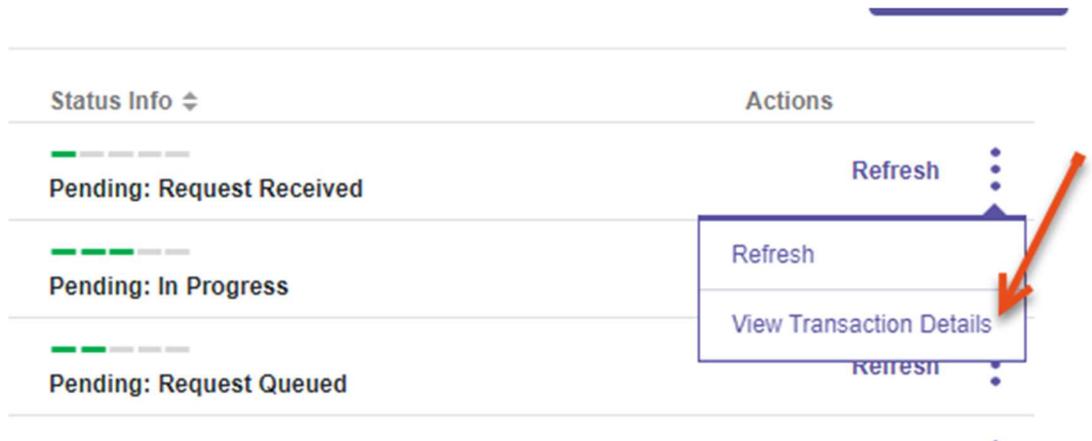
5. The application will display the Transaction Profile for the selected Transaction.

6. Refer to the Transaction Profile for lessons and help content.

Lesson: How to Drill into Batch Profile

1. Locate the Batch in the Match History panel to be viewed.

2. Click on the Multiple Actions icon button (⋮).

3. The application will display a Multiple Action Menu.

   a. Refer to Next Actions details above.

4. Click on the View Batch Details link to access the profile.

Status Info ⇕	Actions
▬▬ ▬ ▬ ▬ **Pending: Request Received**	Refresh ⋮
▬▬ ▬▬ ▬▬ ▬ **Pending: In Progress**	Refresh View Batch Details
▬▬ ▬▬ ▬ ▬ **Pending: Request Queued**	Refresh ⋮

5. The application will display the Batch Profile for the selected Batch.

6. Refer to the Batch Profile for lessons and help content.

Lesson: How to Drill into Location Profile

1. Locate the Location Name in the Match History panel to be viewed.

2. Click on the Location Name link.

Location Info ⇕

Acadia Parish (027)
Brownfields Elementary School (027018)

Acadia Parish (027)
Brownfields Elementary School (027018)

~~Parish~~ (027)   (027018)
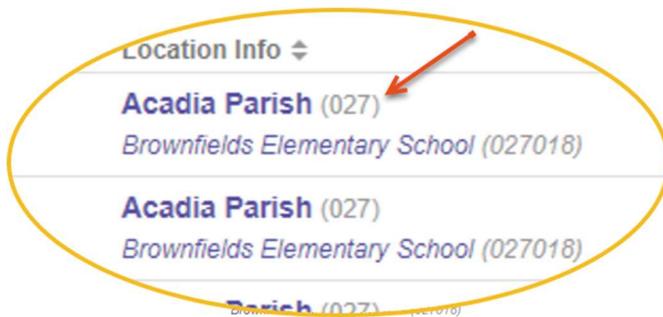
3. The application will display the Location Profile for the selected Location.

4. Refer to the Location Profile for lessons and help content.

▣ Match Options - Person

Overview

The Match Options component enables users to perform matches to a source of indexed data or a Program Index. It includes two tabs: Person and Address. This section will describe the Person Match Option capabilities. Please refer to Match Options: Address for additional details about the address capabilities.

A Person ID match can be completed by a District/School or by the State. If the State generates a Person ID match, it creates a "State Batch" for the districts. In this case, the Match Process matches the Program Index to the Master Index.

> State Batches are generated by the State on the behalf of each District. When the State Batch is initiated the system will perform matches automatically for each District.

The Match Options page includes a Match Options form section and a Match Results section. The Match Results section is not displayed until a match request is performed.

Person Match: Person ID

The purpose of the Person ID Match Option is to allow authorized users source the matching data directly from the UniqID application without having to submit new student

enrollment information and to start the DirectMatch process. The data is sourced from the Master and Master History tables.

The Person ID Match Option will require the user to enter/select the District, School, and Match Type to be performed. When the form is submitted, the application will perform a match with the Person ID data compared to the selected Match Type. For example, if District A and SNAP (Match Type) are selected, the application will perform a match request for all currently enrolled District A students to the SNAP index. The individual Master Records become Submission Records that are matched to the selected Index Records.

The Person ID Match Option includes the following fields:

FIELDS/DATA	DESCRIPTION	FORM INFO
District	Indicates the district that should be used to process the match request.	The District field will display differently based on data authorization and access to District Data. For single district users, the assigned district will be listed and not editable. For multiple district users, the application will display a drop-down of the districts or will display All Districts. See Lesson below for more details.
School	Indicates the school that should be used to process the match request.	The School field will display differently based on data authorization and access to School Data. For single school users, the assigned school will be listed and not editable. For multiple school users, the application will display a drop-down of the schools or will display All Schools. See Lesson below for more details.

FIELDS/DATA	DESCRIPTION	FORM INFO
Match Type	Indicates what data/source the Person ID data will be compared to for the matching process.	Drop down menu that lists all the Match Type options available to the user. Depends on data authorization. See Lesson below for more details.
Match	When clicked, the form will be validated. If errors are returned, the application will display the errors on the screen. If no errors are found, the match process will be initiated.	Button
Reset	When clicked, this link button will reset the form values to the default values.	Button link

Authorized users can generate a state-wide match request using the Person ID data. When this request is made at All Districts level, the batch is a State Batch. These batches are slightly different than a typical batch/transaction in the application. Instead of matching from the Submission Record to the program data, a State Batch matches from the program data to the Person ID data. This helps improve performance and speed of the matching.

To ensure better performance only one State Batch can be running at one time.

A State Batch is generated automatically by the system when an authorized user selects "All Districts" from the Match Options – Person ID match page. When the user clicks the Match button on this Match Options page, the application will retrieve all the students from the selected Match Type Program Index file and match against the Person ID data.

If Matches are found, the student record is updated, and the associated district can view and download the data from Search. If a Near Match is found, the District associated to the Person ID record will be able to resolve the Near Match.

Lesson: How to Match from Person ID

1. Click on the Match Options icon (　　　) on the left navigation panel.

2. On the Match Options page, select 'Person ID' Match Option on Person Tab. This tab should be selected by default.

3. The District field will be selected and set to the District the user has access to for most users. No selection is needed by the user unless the user has access to multiple districts. If the District is pre-selected, skip to step 4. If the Specific District button is visible, go to step 3a.

    a. If the user has access to more than one District, the application will allow the user to select one District by clicking the Specific District button.

    b. When the Specific District button is clicked, a District picker will be displayed.

    c. Enter at least 3 letters of the District name to search for the District. The application will search the District list and display all matching records.

    d. Select the appropriate District from the list by clicking on the name.

4. The School field will be selected and set to All Schools or will list the specific school the user has access to. No selection is required, unless the user has access to multiple schools.

5. Select the "Match Type" program to be searched against from the Match Type drop down menu. This menu will list all the Match Types that the user is authorized to access so this list may vary by user. For example, user Mary Jones may see TANF, SNAP, and Foster, while Jamie Jinks only sees SNAP. This is a single select, so the user can select one Match Type at a time.

6. Click the Match button (**Match**) to submit the form and initiate the match request.

      a. Click the Reset link to reset the page and clear out the user selections.

7. The application will perform a search with the appropriate District data against the selected Match Type and will return the results. Refer to How to Use the Match Results lesson below for more details.

Person Match: Upload File

The purpose of the Upload File tab is to allow authorized users to upload a file that includes one or many student enrollment records to match against and to initiate the Direct Match process.

The Upload File Match Option will require the user to select a file to upload, enter/select the District, and Match Type(s) to be performed. When the form is submitted, the application will perform a match with the file that was uploaded compared to the selected Match Type. For example, if a file with 100 records is uploaded and SNAP (Match Type) is selected, the application will perform a match request with the students in the uploaded file to the SNAP index. The individual records in the upload file become the Submission Records that are matched to the Index Records.
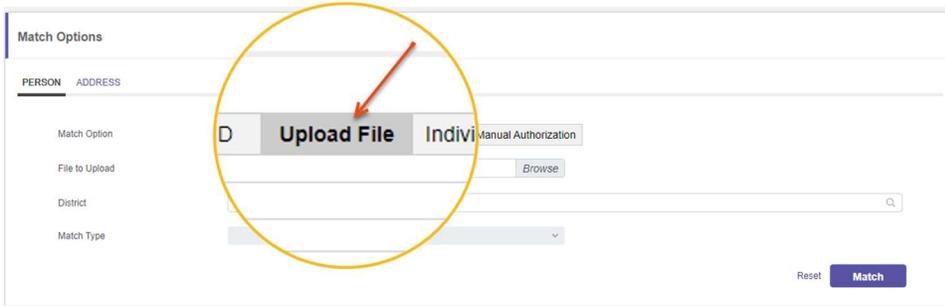
The Upload File Match Option includes the following fields:

FIELDS/DATA	DESCRIPTION	FORM INFO
File to Upload	Indicates the file that will be uploaded to the application for processing.	File selector. Required.

FIELDS/DATA	DESCRIPTION	FORM INFO
District	Indicates the district that should be used to process the match request.	This will be a single district listed or may enable the user to select a specific district depending on data authorization. Required. See Lesson below for more details.
Match Type	Indicates what data/source the Person ID data will be compared to for the matching process.	Drop down menu that lists all the Match Type options available to the user. Depends on data authorization. Required. See Lesson below for more details.
Match	When clicked, the form will be validated. If errors are returned, the application will display the errors on the screen. If no errors are found, the match process will be initiated.	Button
Reset	When clicked, this link button will reset the form values to the default values.	Button link

Lesson: How to Match from Upload File

1. Click on the Match Options icon (⊘) on the left navigation panel.

2. On the Match Options page, select "Upload File" Match Option.

3. Click the Browse button to view the local computer system directory structure. The file must be accessible by the user on the local drive or network drive in order to upload the file.
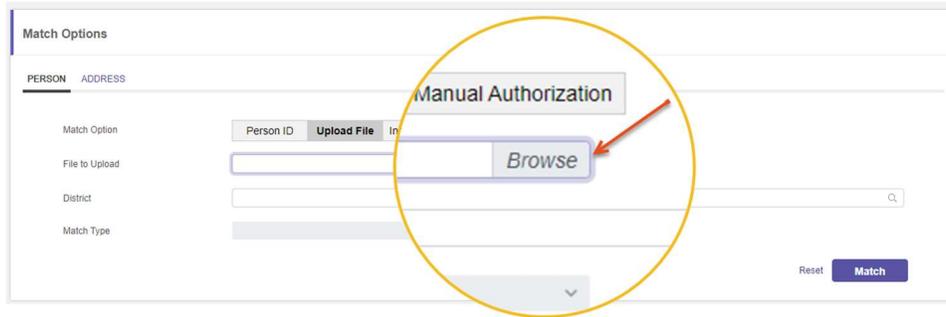
4. Browse through the directory structure and choose the directory/folder where the Batch file is stored.

5. Select the appropriate file from the local system and click the [Open ▼] button.
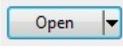
6. The District field will be selected and set to the District the user has access to for most users. No selection is required unless the user has access to multiple districts. If the District is pre-selected, skip to step 7. If the District selector drop-down is visible, go to step 6a.

    a. If the user has access to more than one District, the application will allow the user to select one District by searching in the District selector field option.

    b. Enter at least 3 letters of the District name to search for the District. The application will search the District list and display all matching records.

    c. Select the appropriate District from the list by clicking on the name.

7. Select the "Match Type" program(s) to be searched against from the Match Type drop down menu. This menu will list all the Match Types that the user is authorized to access so this list may vary by user. This is a multiple select menu, so the user can select one or many Match Types.

8. Click the Match button (**Match**) to submit the form and initiate the match request.

    a. Click the Reset link to reset the page and clear out the user selections.

9. The application will perform a search with the uploaded data against the selected Match Type and will return the results. Refer to How to Use the Match Results lesson below for more details.

Person Match: Individual Match

The purpose of the Individual Match is to allow users to initiate the DirectMatch process by submitting student enrollment information one student at a time using an online entry form. The data that is submitted in the form becomes a Submission Record that is compared to the Program Index Records.

> If a State ID is submitted in the form, the data in the eScholar Uniq-ID system for that person will be used for matching and not the data entered on the form.

The form includes the following fields:

FIELDS/DATA	DESCRIPTION	FORM INFO
District	Indicates the district that should be used to process the match request.	This will be a single district listed or may enable the user to select a specific district depending on

FIELDS/DATA	DESCRIPTION	FORM INFO
		data authorization. See Lesson below for more details.
School	Indicates the school that should be used to process the match request.	This will be "All Schools" or a single school listed or may enable the user to select a specific school. Depends on data authorization. See Lesson below for more details.
Match Type	Indicates what data/source the Person ID data will be compared to for the matching process.	Drop down menu that lists all the Match Type options available to the user. Depends on data authorization. See Lesson below for more details.
Person Type	Indicates the Person Type for the student.	Defaults to "Student". Cannot be changed.
First Name	The legal first name of the student. Used for Matching.	Textbox. Required.
Middle Name	The legal middle name of the student. Used for Matching if provided.	Textbox. Optional by default but may be required by a System Administrator.
Last Name	The legal last name of the student. Used for Matching.	Textbox. Required.
Alternate Last Name	An alternate last name that may have been used for the student. Used for Matching if provided.	Textbox. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Suffix	A suffix used for the student. Used for Matching if provided.	Textbox. Optional by default but may be required by a System Administrator.
Gender	The documented gender for the student. Used for Matching.	Button Group with valid gender options. Must select one option. Required.
DOB	The documented date of birth for the student. Used for Matching.	MM/DD/YYYY Date picker with a calendar selection. Required.
Ethnicity	The documented ethnicity for the student.	Drop down menu with valid ethnicity options. Must select one option. Required.
Race	The documented race for the student.	Drop down menu with valid race options. Must select one option. Required.
Race 2	The documented 2nd race for the student.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.
Race 3	The documented 3rd race for the student.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.
Race 4	The documented 4th race for the student.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Race 5	The documented 5th race for the student.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.
Full Name	The full name of the student.	Textbox. Optional by default but may be required by a System Administrator.
SSN	The documented Social Security Number for the student. Used for Matching if provided.	Must be a valid 9-digit SSN. Optional by default but may be required by a System Administrator.
Local ID	The local identifier for the student for the Source.	Textbox. Required.
Source	The name of the source system where the student data originated/was extracted from.	Drop down menu with valid source system options. Can select one option. Required.
State ID	If the student has an existing State Identifier, it should be provided here.	Textbox. Optional.
Grade	The documented current grade level for the student.	Drop down menu with valid grade options. Can select one option. Required.
Address 1	The documented current address for the student. This can be used for Address Matching.	Textbox. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Address 2	The documented current secondary address for the student. This can include apartment numbers or suites.	Textbox. Optional by default but may be required by a System Administrator.
City	The documented current city for the student.	Textbox. Optional by default but may be required by a System Administrator.
State	The documented current state for the student.	Drop down menu with valid state options. Optional by default but may be required by a System Administrator.
Zip	The documented current zip for the student.	Textbox. Optional by default but may be required by a System Administrator.
Match	When clicked, the form will be validated. If errors are returned, the application will display the errors on the screen. If no errors are found, the match process will be initiated.	Button
Reset	When clicked, this link button will reset the form values to the default values.	Button link

If there are errors in the form, the application will display an error page which includes field level error messages as shown below. The errors must be corrected before the form can be submitted again.

Lesson: How to Match from Individual Match

1. Click on the Match Options icon ( ) on the left navigation panel.

2. On the Match Options page, select "Individual Match" Match Option.

3. The District field will be selected and set to the District the user has access to for most users. No selection is required unless the user has access to multiple districts. If the District is pre-selected, skip to step 4. If the District selector drop-down is visible, go to step 3a.

   a. If the user has access to more than one District, the application will allow the user to select one District by searching in the District selector field option.

   b. Enter at least 3 letters of the District name to search for the District. The application will search the District list and display all matching records.

   c. Select the appropriate District from the list by clicking on the name.

4. The School field will be selected and set to All Schools or the specific School the user has access to in the application. No selection is required. If the School is pre-selected, skip to step 5. If the School selector drop-down is visible, go to step 4a.

   a. If the user has access to more than one School, the application will allow the user to select one School by searching in the School selector field option.

   b. Enter at least 3 letters of the School name to search for the School. The application will search the School list and display all matching records.

   c. Select the appropriate School from the list by clicking on the name.

Match Options

PERSON   ADDRESS

Match Option	Person ID	Upload File	**Individual Match**	Manual Authorization
Match Option				
District	District of Columbia (002) (change)			
School	Christian Acres Youth Center Inc.			
Match Type	Foster ⌄			

5. Select the "Match Type" program(s) to be searched against from the Match Type drop down menu. This menu will list all the Match Types that the user is authorized to access so this list may vary by user. This is a single select menu, so the user can select one Match Type at a time.

6. Complete the "Individual Match" form. Refer to the fields listed above for requirements and form elements.

7. Click the Match button (**Match**) to submit the form and initiate the match request.

   a. Click the Reset link to reset the page and clear out the user selections.

8. Validate and Fix Errors - The application will validate all the data entered by the user. If one or more data errors are found, the application will return an error message.

9. The application will perform a search with the uploaded data against the selected Match Type and will return the results. Refer to How to Use the Match Results lesson below for more details.

Match Results

When a match is performed with Person ID, Upload File, or Individual Match, the application will complete the Match Process described above and will return results. This panel is very similar to the Match History component and Recent Activity on the Dashboard in that the user can view the status of the Batch/Transaction and perform next actions such as Resolve or View Transaction.

The Match Results panel will include a Refresh button and the data and options listed below. To refresh the data in the Match Results panel, click the Refresh button (⟳).

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Transaction Info	Transaction ID Submission Type	Includes the Transaction Reference ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. This is only

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		visible for the Individual Match Options submission type.
Batch Info	Batch ID Submission Type	Includes the Batch ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. This is only visible for the Person ID and Upload File submission types.
Match Type	Program/Match Type	Includes the Match Type, such as SNAP, TANF, Medicaid or other Match Type.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Batch ID	Batch ID	If the Transaction is associated to a Batch, the Batch ID will be listed and will be a hyperlink to the Batch Info page. This is only visible for the Individual Match Options submission type.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Transaction and the text of the Status.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Actions		• Dropdown Menu: Click to view more actions o Continue o Refresh o Resolve o View o Download o View Transaction Details

Lesson: How to View Match Results

1. Click on the Match Options icon ( ) on the left navigation panel.

2. Perform a Match with Person ID, Upload File or Individual Match.

3. The application will display the Match Results panel below the search form and will include the data described above and shown below.

Person ID Match Results Example
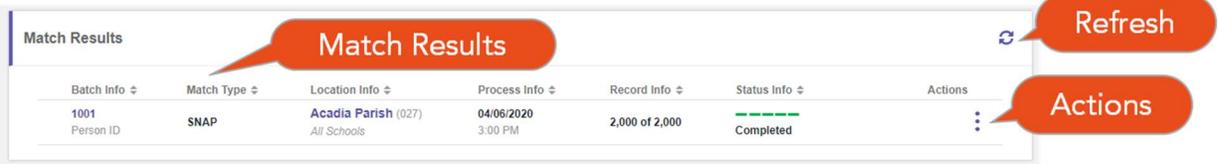
Upload File Match Results Example
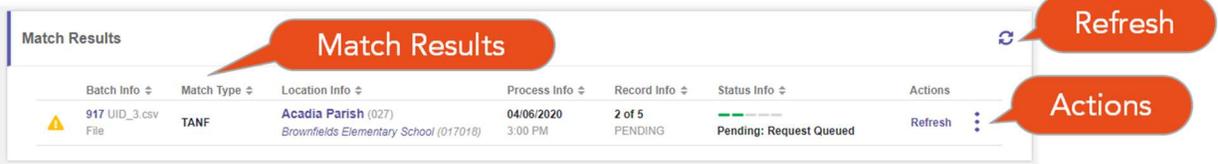
Individual Match Results Example
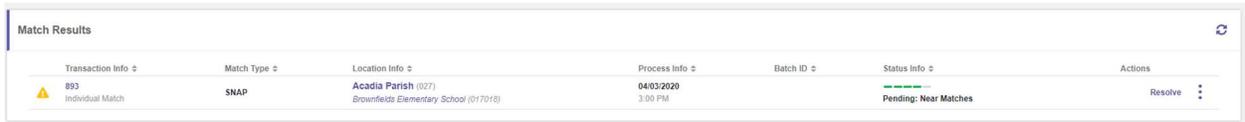
4. If a next action is expected, the application will include a text link for the action. For example, the Resolve link will be displayed if there are pending Near Matches.

Additionally, the application will include the Multiple Actions icon (⋮).
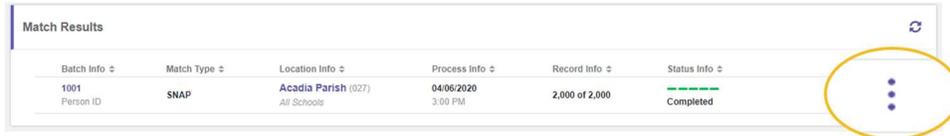
5. Click the appropriate Next Action icon or link.

Person Match: Manual Authorization

The purpose of the Manual Authorization is to allow users to add a Match Type program to specific student using the State ID when the program has not been matched via Person ID, Upload File or Individual Match. This should only be used when the program has otherwise been validated/verified.
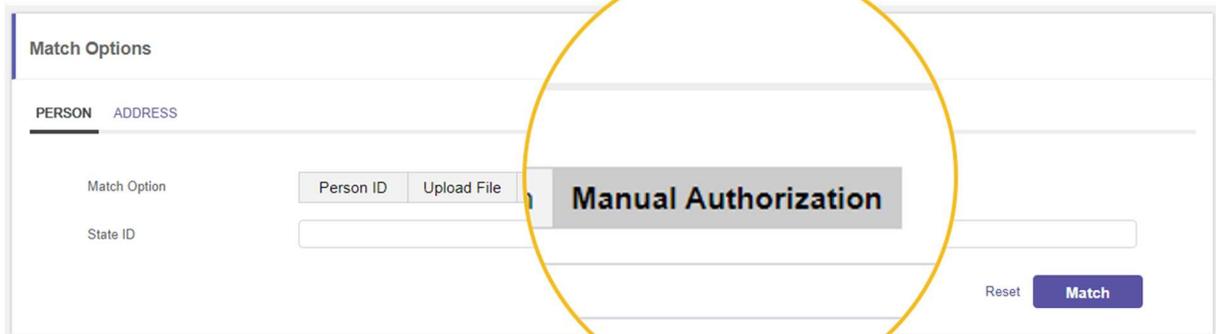
The Manual Match search form includes the following fields:

FIELDS/DATA	DESCRIPTION	FORM INFO
State ID	Indicates the State ID of the student to be edited for Manual Matches.	Textbox. Required.
Match	When clicked, the form will be validated. If errors are returned, the application will display the errors on the screen. If no errors are found, the Manual Match process will be initiated.	Button
Reset	When clicked, this link button will reset the form values to the default values.	Button link

Manual Authorization Match Results

The Match Results will include the name of the student, State ID, address (if available), district and school assignments, date of birth, gender, and grade in a descriptive header. The results will also display an edit icon, a Manual Match Type section, and an All Other Match Types section.

The table below describes each section and field in more detail.

CATEGORY	FIELDS/DATA	DESCRIPTION
Student Header	Name (State ID)	Lists the First and Last Name and Assigned/Associated State ID for the selected student.
	Address 1	Lists the address for the selected student, if available.
	City	Lists the city for the selected student, if available.
	State	Lists the state for the selected student, if available.
	Zip Code	Lists the zip code for the selected student, if available.
	District Name (Local Code)	Lists the name of the district where the student is currently enrolled.
	School Name (Local Code)	Lists the name of the school where the student is currently enrolled.
	DOB	Lists the date of birth for the selected student in MM/DD/YYYY format.
	Gender	Lists the documented gender for the selected student.
	Grade	Lists the current grade level for the selected student.
	Edit Icon	Enables the user to edit and add additional programs to the Manual Match section.
Manual Match Section	Eligibility Type	Lists the program(s) that was manually added via Manual Authorization.

CATEGORY	FIELDS/DATA	DESCRIPTION
	Start Date	Lists the start date for the program that was manually added via Manual Authorization.
	End Date	Lists the end date for the program that was manually added via Manual Authorization.
	Match Reason	Lists the match reason as entered by the user for the program that was manually added via Manual Authorization.
All Other Match Types	Eligibility Type	Lists the program(s) that were added via Person ID, Upload File, or Individual Match requests.
	Identified Date	Indicates the earliest data the student was matched for the specific Match Type.
	Match Source	Lists the method how the match was performed, such as Person ID, Upload File, or Individual Match.
	Location Information	Lists the District Name and District Code and the School Name and School Code.

Lesson: How to Add a Manual Authorization

1. Click on the Match Options icon (⊘) on the left navigation panel.

2. On the Match Options page, select "Manual Authorization" Match Option.

3. Enter a valid State ID for the student to be manually matched.

4. Click the Match button (**Match**) to submit the form and initiate the manual match request.

a. Click the Reset link to reset the page and clear out the user selections.

5. The application will validate State ID entered by the user. If one or more data errors are found, the application will return an error message.

6. The application will search for the State ID and will return Match Results for the selected student.

7. Click the Edit icon (✎) in the top right of the Student Header near the DOB, Gender, and Grade fields.

Match Results

Bob Smith (9818400021)	Acadia Parish (027)	DOB: 09/23/2001	✎
159900 Bloomingdale Ave	Crowley High (70526)	Gender: Male	
Crowley, LA 70526		Grade: 10	

Manual Match Type

Eligibility Type	Start Date	End Date
Medicate	11/11/2020	N/A

Match Reason: Etiam at erat consequat neque auctor venenatis in eget est. Aenean ac purus in lorem consequat commodo.

All Other Match Types

Eligibility Type ⇕	Identified Date ⇕	Match Source ⇕	Location Info ⇕
Head Start	09/01/2020	External	Acadia Parish (027) Crowley High (70526)
SNAP	10/01/2020	DirectMatch District	Acadia Parish (027) Crowley High (70526)
SNAP	09/01/2020	DirectMatch District	Acadia Parish (027) Brownfields Elementary School (027011)
TANF	09/01/2018	File	Acadia Parish (027) Crowley High (70526)

8. The application will display the Manual Match section in edit mode with an +Add New Program link.

9. Click the +Add New Program link.

10. The application will display a new add section which includes a drop-down menu for the Match Type, date selectors for the Start and End Date for the program, and a Match Reason textbox.

11. Enter or select the appropriate values for the form.

12. Click the Update button to add the new Manual Authorization Match Type.

    a. To reset the form, click the Reset link.

13. Once the update is completed, the newly added program will be displayed in the Manual Match section with the related data.

Lesson: How to Edit a Manual Authorization

1. Click on the Match Options icon ( ) on the left navigation panel.

2. On the Match Options page, select "Manual Authorization" Match Option.

3. Enter a valid State ID for the student to be manually matched.

4. Click the Match button ( ) to submit the form and initiate the manual match request.

    a. Click the Reset link to reset the page and clear out the user selections.

5. Validate and Fix Errors - The application will validate all the data entered by the user. If one or more data errors are found, the application will return an error message.

6. The application will search for the State ID and will return Match Results for the selected student.

7. Click the Edit icon (🖊) in the top right of the Student Header near the DOB, Gender, and Grade fields.

8. Enter or select the appropriate values for the form for the Match Type to be edited for the Start Date, End Date or Match Reason.

9. Click the Update button to update the Manual Authorization Match Type.

   a. To reset the form, click the Reset link.

10. Once the update is completed, the newly updated program will be displayed in the Manual Match section with the related data.

🔖 Match Options - Address

Chapter Highlights

- [Overview](#)
- [Address Match](#)

Overview

The Match Options component enables users to perform matches to a source of indexed data or Program Index. It includes two tabs: Person and Address. This section will describe the Address Match Option capabilities. Please refer to Match Options: Person for additional details about the Person Match Option capabilities.

The Match Options page includes a Match Options form section and a Match Results section. The Match Results section is not displayed until a match request is performed.

Address Match

The purpose of the Address tab is to allow authorized users to run, view and resolve matches performed from Person ID address data to SNAP address data. This feature is disabled for all district users. The LDOE is the authorized user and will run the Address Match for all districts on a monthly basis. District users will resolve all near matches for their districts.

When an Address Match is generated, the application will identify all the eligible addresses in the SNAP data and find any students located at that address who are not currently eligible. The Address Match component includes a CEP DC Extended Header Panel and Match Results.

CEP DC Extended Header Panel

The CEP DC Extended Header Panel displays details about the selected SFA. Authorized users can view this data for their own location. This panel includes the following data:

FIELDS/DATA	DESCRIPTION
Last Run Date	Lists the date the Address Match was performed.
Status	Lists the Status of the current run Address Match Result. This can be In Progress or Complete. If a match is in the "In Progress" status, the Run Now action will not be available.
Matches Queued	Lists total number of possible address matches queued in the application based on the last run date.

FIELDS/DATA	DESCRIPTION
Run Now	This action button enables authorized users to initiate an Address Match request.

Match Results Panel

The Match Results Panel displays all the potential address matches for the locations the user is authorized to view. For example, the results for students in District A will only be visible to District A users. Each address match will be displayed in its own Match Results Panel with a Match Header and an expandable/collapsible Student(s) at Matched Address section.

SECTION	DATA/FIELD	DESCRIPTION
Match Header	Match Indicator	Displays the Near Match Indicator ( ).
	Eligible Address	Lists the SNAP Eligible Address that was searched matched to the Matched Address.
	Matched Address	Lists the Address from the Person ID data that matched to the SNAP Address data.
	Match Score	Indicates the Match Score of the Matched Address to the Eligible Address.
	Students Potentially Eligible Count	Lists the count of students that are potentially eligible for the Matched Address.
	Actions	<table><tr><td>Icon</td><td>Description</td></tr><tr><td></td><td>View Details: Allows the user to expand details. When clicked, this icon will expand the Student(s) at Matched Address section.</td></tr></table>

SECTION	DATA/FIELD	DESCRIPTION	
		⌃	Hide Details: Allows the user to collapse details. When clicked, this icon will collapse the Student(s) at Matched Address section.
		🚫	No Match: Allows the user to make a "No Match" decision for all the students listed at the Matched Address. When clicked the Matched Address and all the students listed at the Matched Address will be labeled as a No Match.
		✓	Match: Allows the user to make a "Match" decision for all the students listed at the Matched Address. When clicked, the Matched Address and all the students listed at the Matched Address will be labeled as a Match. These previously ineligible students will be listed as DC Extended Matches.
Student(s) at Matched Address	Student Name	Displays the First, Last Name and State ID of the student listed at the Matched Address.	
	District (Code)	Displays the District Name and Code of the student listed at the Matched Address.	
	School (Code)	Displays the School Name and Code of the student listed at the Matched Address.	
	Grade	Displays the current Grade Level of the student listed at the Matched Address.	
	Gender	Displays the Gender of the student listed at the Matched Address.	

SECTION	DATA/FIELD	DESCRIPTION
	Date of Birth	Displays the Date of Birth of the student listed at the Matched Address.
Actions		<table><tr><th>Icon</th><th>Description</th></tr><tr><td>⊘</td><td>No Match: Allows the user to make a "No Match" decision for the selected student at the Matched Address. When clicked, the Matched Address and the associated student at the Matched Address will be labeled as a No Match.</td></tr><tr><td>✓</td><td>Match: Allows the user to make a "Match" decision for the selected student at the Matched Address. When clicked, the Matched Address and the associated student at the Matched Address will be labeled as a Match. The previously ineligible student will be listed as DC Extended Matches.</td></tr></table>

Lesson: How to Run Address Match

1. Click on the Match Options icon (⊘) on the left navigation panel.

2. On the Match Options page, click on the Address Tab.

3. Review the CEP DC Extended Header information to determine the last run date for the Address Match.

4. Click on the Run Now button.

5. If an Address Match has been performed previously, a Confirm Action modal will be displayed.

    a. Click the Run DC Extended Match to initiate a new search.

b. Click the Cancel button link to cancel the request.

Confirm Action   ✕

If you run DC Extended match, all existing Match Results will be removed.
Are you sure you want to run DC Extended match now?

Cancel   **Run DC Extended Match**

ℹ️ When potential matches exist from a prior Address Match run, they will be removed from the queue when the new run is performed. For example, if 123 Main Street is a match in the run from March 1st, it will be deleted if the Address Match is performed again on March 22nd. If the address still exists in the Master data and SNAP data, the match should be generated again.

6. When Run DC Extended Match is clicked, the application will initiate and complete an Address Match and will return results when the search is complete.

7. The CEP DC Extended Header will indicate the progress of the Address Match process, including "In Progress" or "Completed".

ℹ️ An Address Match may take several minutes to complete. Once it is completed the results will be displayed. It is not required to stay on the page for the process to finish.

Lesson: How to make 'Match' Decision at the Address Level

1. Ensure that an Address Match has been performed as described above.

2. Click the Match icon (✓) in the Match Header to the right of the count of Students Potentially Eligible. NOTE: This will set each of the students listed in the Student(s) at Matched Address to a Match.
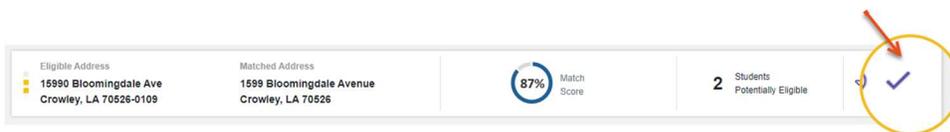
3. A message confirming the action will appear at the top of the screen.

✓ The student(s) at Matched Address are matched successfully.

Lesson: How to make 'Match' Decision at the Student Level

1. Ensure that an Address Match has been performed as described above.

2. Click the View Details icon (▽) to expand the Student(s) at Matched Address section.

3. The application will display the Student(s) at Matched Address section with the name, district, school and other details for each student that is located at the Matched Address.

4. Click the Match icon (✓) in the Student(s) at Matched Address section to the right of the student name to Match. NOTE: This will set the student to a Match.
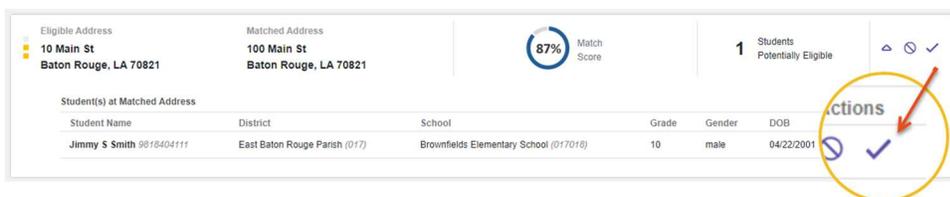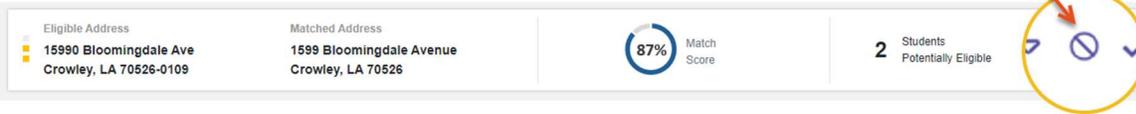

5. A message confirming the action will appear at the top of the screen.

✓ The student(s) at Matched Address are matched successfully.

Lesson: How to make 'No Match' Decision at the Address Level

1. Ensure that an Address Match has been performed as described above.

2. Click the No Match icon ( ) in the Match Header to the right of the count of Students Potentially Eligible. NOTE: This will set each of the students listed in the Student(s) at Matched Address to a No Match.

3. The application will display a Confirm Decision modal with a Cancel link button and a "Yes Select No Match" button.
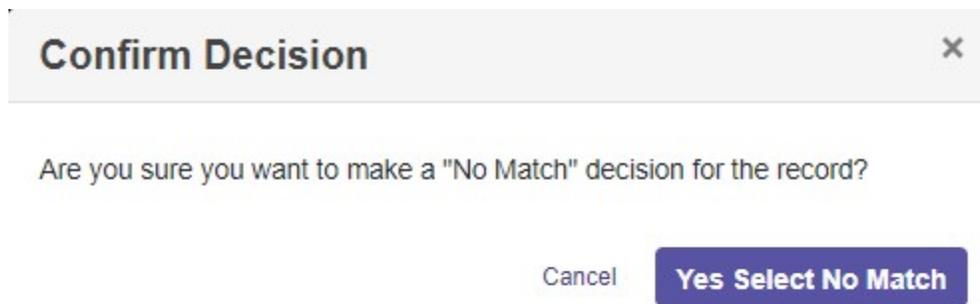
4. Click the "Yes Select No Match" button to confirm the No Match decision.

   a. Click the Cancel link button to cancel the request.

5. A message confirming the action will appear at the top of the screen.

Lesson: How to make 'No Match' Decision at the Student Level

1. Ensure that an Address Match has been performed as described above.

2. Click the View Details icon ( ) to expand the Student(s) at Matched Address section.

3. The application will display the Student(s) at Matched Address section with the name, district, school and other details for each student that is located at the Matched Address.

4. Click the No Match icon (⊘) in the Student(s) at Matched Address section to the right of the student name to No Match. NOTE: This will set the student to a No Match.

5. The application will display a Confirm Decision modal with a Cancel link button and a Yes Select No Match button.
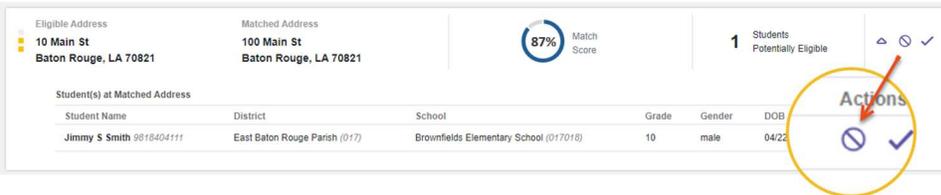

6. Click the "Yes Select No Match" button to confirm the No Match decision.

    a. Click the Cancel link button to cancel the request.

7. A message confirming the action will appear at the top of the screen.

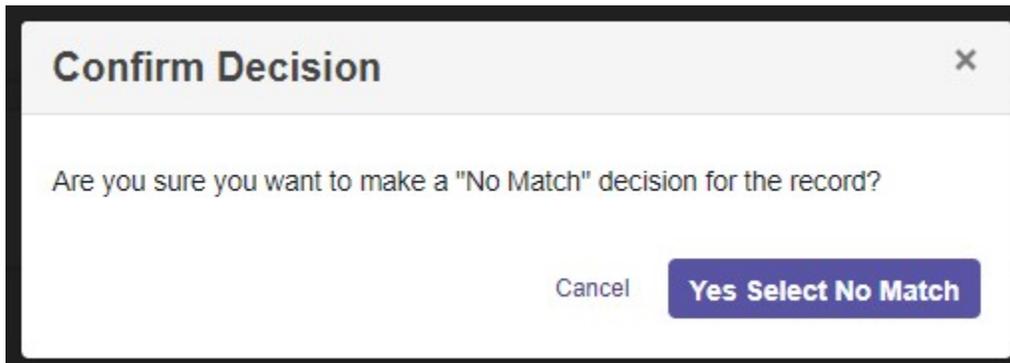✓ "No Match" decision has been made for the record.

🔖 Resolve Near Match

Chapter Highlights

- [Overview](#)
- [Near Match List](#)
- [Compare Records (Near Match)](#)

-

ℹ️ In some cases, a Program Index Record might match to two different students in the Person ID Master Index from two different districts. If this happens, both Districts will see a Near Match, but only one of the Districts can "Match" to the Program Index record.

Near Match List

- [Collapsed Panel](#)

-

- [Expanded Panel](#)

-

-
- [Compare Records (Near Match)](#)

Overview

The application maintains an index/repository of data for each program (Program Index). This data is provided by an external source, such as SNAP or TANF. The Program Index is updated on a scheduled basis, dependent on the program type. For example, SNAP might be updated monthly while Foster is updated quarterly.

When matches are performed, the Submission Record(s) are matched against this Program Index data. Submission Records are created from the Match Options component by using Person ID, Upload File or Individual Match. The Submission Records are searched against the Index Records through the Match Process, which determines a Match, Near Match, or No Match. Each concept is described in detail below.

If a Near Match is found, it means that an Index Record is a potential match to the Submission Record. All Near Match records must be resolved so that students can be identified as eligible or ineligible for a program. Near Match records can be resolved by deciding a record is a Match, No Match, or by Canceling the record(s). One Batch may have one or many Submission Records in a near match status and one Submission Record may have one or many pending near matches.

When resolving pending near matches, the user is identifying if the Submission Record is the same or different than the pending near matches. The Submission Record either matches one of the potential matches or does not match any of them.

The pending Near Matches are accessible from the Dashboard Recent Activity Panel, Match History component, and Match Options component via the Resolve action link/button. When the Resolve link is clicked, the application will navigate to the Near Match List page and then users can access the Compare Near Match page from the list. Near Matches can be resolved from the Near Match List page or the Compare Near Match page.

> The process of making a near match decision is important. When deciding, please review the information in detail to ensure you are making the correct decision. The following issues can arise from poor near match decisions:
>
> Incorrectly Matching/Not Matching a submission record to the SNAP program record will erroneously label a student as SNAP eligible/ineligible which could have repercussions on the data that is reported and what programs the student is eligible to receive at school.

The following buttons/functions are available when resolving a pending near match:

FUNCTION	DESCRIPTION
Match	When the Match button is clicked, the Submission Record will retrieve the identifier/Client Index ID/Case Number of the Index Record. When the Match button is clicked, all other near matches for the Submission Record are removed.
No Match	When the No Match button is clicked, all other near matches for the Submission Record are removed. The Submission Record will not be linked to an eligible program when a No Match is decided.
Cancel Submission Record	When the Cancel Submission Record link button is clicked, the Submission Record is canceled and all pending near matches for this Submission Record are canceled. This only cancels the specific Submission Record the user is reviewing and does not impact other Submission Records in the Batch.

System Administrators can enable/disable the above functionality based upon implementation needs. If a feature is not visible/accessible, it may not be enabled for the role.

In some cases, a Program Index Record might match to two different students in the Person ID Master Index from two different districts. If this happens, both Districts will see a Near Match, but only one of the Districts can "Match" to the Program Index record.

Near Match List

The Near Match List page will display all pending near matches for the Batch or Transaction, depending on how the user accessed the list. Since a Batch can be a Batch or a State Batch, the information on the page will vary by this batch type as described below.

The page includes Near Match List Header, Filter options, and a list of Pending Near Matches.

Near Match Header

The Near Match Header includes basic information about the Near Matches.

DATA/FIELD	DESCRIPTION
Panel Text	Displays "The system found Near Matches which should be reviewed and resolved by a user. Next Steps: Review Near Matches below"
Near Matches	Displays the total count of pending Near Matches to be resolved for the Batch/Transaction.

Filter Options

The Filter Option allows the Near Match List to be filtered based on specific needs, including by Transaction ID, Batch ID, School Year and others as described below.

DATA/FIELD	IMAGE	DESCRIPTION
Transaction ID	Transaction ID :	Each Transaction is assigned a unique Transaction identifier. This filter field will restrict the results to the specific Transaction ID entered in this field. This option is not available on the Batch Tab. To filter on a Transaction ID, enter the ID in the Transaction ID field.
Batch ID	Batch ID :	Each Batch is assigned a unique Batch identifier. This filter field will restrict the results to the specific Batch ID entered in this field. To filter on a Batch ID, enter the ID in the Batch ID field.
Submission Type	Submission Type : File Individual Match SLF Edit WebService Automation Clear	The Submission Type filter will list all the Submission Type options available to the user. This may include: ▪ File ▪ Individual Match ▪ SLF ▪ Edit

		▪ Web Services ▪ Automation To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
Match Type	Match Type : ☐ TANF ☐ SNAP Max Match Score Desc	The Match Type filter will list all the Match Type options available to the user. This may include: ▪ SNAP ▪ TANF To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
District	District :	The District filter will list all the districts the user is authorized to view. This filter option also includes a search feature. To filter on one or more of the options, click the selection box(es) to the left of the name. To search for a specific District, enter at least 3 letters of the district name in the search field. To clear all selected options, click the Clear link.

	District : Acadia Parish (027) East Baton Rouge Parish (017) East Carroll Parish (035) Franklin Parish (041) Grant Parish (043) Jackson Parish (049) Jefferson Parish (051) Lafayette Parish School Board (02: Livingston Parish (045) Madison Parish (089) Display 25 of 28 records Search to find additional locations. Clear	
School	School : School : School Year : 2020 Alice Harte Elementary Charter School (017082) Acadia Parish (027) Benjamin Franklin Elementary Math and Science … (01701 Acadia Parish (027) Brownfields Elementary School (017016) Acadia Parish (027) Cedarcrest-Southmoor Elementary School (017022) Acadia Parish (027) Clairborne Elementary School (017026) Acadia Parish (027) Display 25 of 28 records Search to find additional locations. Clear	The School filter will list all the schools the user is authorized to view. This filter option also includes a search feature. To filter on one or more of the options, click the selection box(es) to the left of the name. To search for a specific school, enter at least 3 letters of the school name in the search field. To clear all selected options, click the Clear link.
School Year	School Year : 2020 ☑ 2020 ☐ 2019 ☐ 2018 ☐ 2017 Clear	The School Year filter will list all the school year options. To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
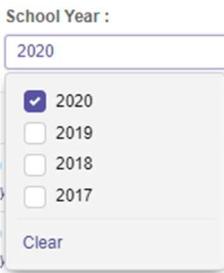
Sort By	Sort By : Max Match Score Desc ⌄	The Sort By option sorts the results by the selected option. The options are: • Max Match Score Desc • Max Match Score Asc • Last Name Desc • Last Name Asc

Pending Near Matches Section

The Pending Near Matches section will list one Near Match Record panel per Near Match. This allows users to resolve Near Matches or to drill into the Compare Near Match page. The contents of the Near Match Record panel will be different between a Batch and a State Batch as described below. Each panel can be expanded to display all the potential matches for the record.

Since the Match Process for a State Batch is done in reverse of a typical match, the pending Near Matches will display differently for end users. The table below provides the data/fields that are displayed for Batches and State Batches.

Near Match Record Panel

FIELDS/DATA	BATCH	STATE BATCH
Batch Indicator	None	State Icon
Panel Title	Submission Record	Program Record
Person Data	Name	Name
	District and District Code	DOB
	School and School Code	Grade
	DOB	Client ID
	Grade	Race
	Local ID	Gender

	Race Gender SSN	SSN
Match Information	Max Match Score Donut Chart Count of Potential Matches	Max Match Score Donut Chart Count of Potential Matches
Actions	Icon	Description
	▽	View Details: Allows the user to expand details. When clicked, this icon will expand the Potential Matches to Master Data section.
	△	Hide Details: Allows the user to collapse details. When clicked, this icon will collapse the Potential Matches to Master Data section.
	⊘	No Match: Allows the user to make a "No Match" decision for the Submission Record for all the potential matches displayed in the Potential Matches to Master Data section.
	≫	Drill Into: When clicked, the application will navigate to the Compare Near Match page for the selected Submission Record.

Batch Near Match List Panel

State Batch Near Match List Panel

Submission Records from a State Batch

STATE BATCH
Program Record
Jones, Oliver

DOB: **09/23/2001**
Grade: **Undergraduate**
Client ID: **12345**

Race: **White**
Gender: **Male**
SSN: **098-12-1133**

87% Max Match Score

4 Potential Matches

Potential Matches Section

DATA/FIELD	DESCRIPTION
Person Name	Displays the First, Last Name and Client Index ID of the potential Near Match (Index Record).
Location	Displays the District Name and Code and School and Code of potential Near Match (Index Record).
DOB	Displays the Date of Birth of the potential Near Match (Index Record).
Grade	Displays the current Grade Level of the potential Near Match (Index Record).
Local ID	Displays the Local ID of the student for the potential Near Match (Index Record).
Race	Displays the current Race of the student for the potential Near Match (Index Record).
Gender	Displays the Gender of the student for the potential Near Match (Index Record).
SSN	Displays the Social Security Number of the student for the potential Near Match (Index Record). NOTE: This field may be masked.

DATA/FIELD	DESCRIPTION		
Match Score	Displays the Match Score for the potential Near Match (Index Record).		
Actions	Icon	Description	
	✔	Match: Allows the user to make a "Match" decision for the Submission Record for the selected potential match displayed in the Potential Matches to Master Data section.	
	»	Drill Into: When clicked, the application will navigate to the Compare Near Match page for the selected Submission Record.	

Collapsed Panel

Pending Near Matches

Submission Record
Oliver Jones
Acadia Parish *(027)*
Brownfields Elementary School *(027018)*

DOB: **09/23/2001**
Grade: **undergraduate**
Local ID: **12345**

Race: **White**
Gender: **Male**
SSN: **098-12-1133**

87% Max Match Score

4 Potential Matches

▽ ⊘ »

Legend

Match Indicators   **Decision Icons**

▮ Match   ▮ Near Match   ✔ Match   ⊘ No Match

Expanded Panel

Expanded Potential Match List

Compare Records (Near Match)

The Compare Records page allows users to view a side-by-side comparison of the Submission Record to each potential Near Match. This comparison enables users to make informed Match Decisions by viewing all the data from each record. The Compare Records page includes Compare Records Header and Submission Record details.

The Compare Records page lists the Submission Record and all Near Matches that have been returned by the Matching Process. The differences between the Submission Record and the Near Match are highlighted to distinguish the differences. Once a user reviews the comparison between the records, a Match or No Match decision can be made, or the record can be canceled.

- The Match decision is made at an individual Near Match record level and will link the Submission Record to the "matched" Near Match Record. All other potential near matches will be canceled when a Match Decision is made.

- The No Match decision is made at the Submission Record level and indicates that none of the Near Matches listed are a match. All near matches are canceled and the record is not linked to any Index Records when a No Match decision is made.

- A cancel decisions cancels the entire submission and all related pending Near Matches.

The process of making a near match decision is important. When deciding, please review the information in detail to ensure you are making the correct decision. The following issues can arise from poor near match decisions:

Incorrectly Matching/Not Matching a submission record to the SNAP program record will erroneously label a student as SNAP eligible/ineligible which could have repercussions on the data that is reported and what programs the student is eligible to receive at school.

Compare Near Match Header

The Compare Near Match Header provides details about the specific Near Match Records being reviewed on the page. The information displayed in the Compare Near Match Header depends on the type of Batch being reviewed by the user.

Batch Compare Near Match Header

State Batch Compare Near Match Header
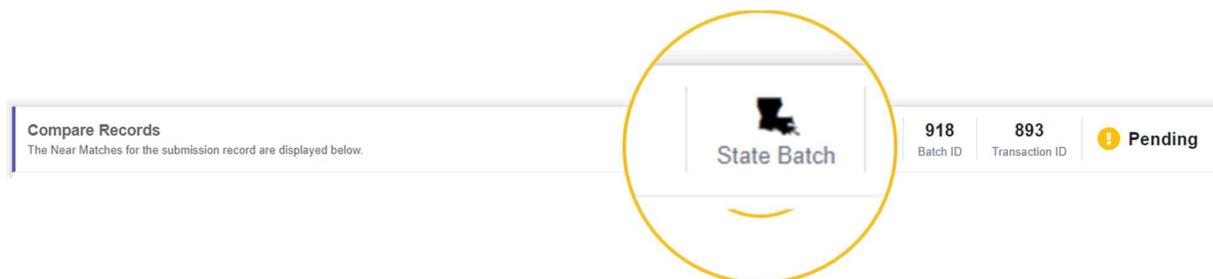
Compare Near Match Status Panel

The Status Panel indicates the status of the selected Near Match and provides next steps. The available panels are:

Pending

The user must resolve the Near Match or the user can navigate to the Transaction Details page or the Home Page or Pending Near Match List.

No Match Decision

No further steps are required for the Near Match and the user can navigate to the Transaction Details page or the Home Page or Pending Near Match List.

Match

No further steps are required for the Near Match and the user can navigate to the Transaction Details page or the Home Page or Pending Near Match List.

Match Decision
The submission record was matched to an existing record.
Resolved by: Andrea Hartman on 05/22/2021

View Pending Near Match List
View Transaction Details

Canceled

No further steps are required for the Near Match and the user can navigate to the Transaction Details page or the Home Page or Pending Near Match List.
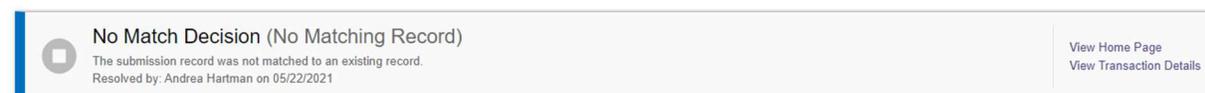

Canceled
The submission record has been canceled.
Canceled by: Andrea Hartman on 05/22/2021

View Pending Near Match List
View Transaction Details

Comparison Section / Submission Record Details

The Compare Records page includes a Submission Record details section which lists the fields categorized into Matching Fields, Person Information, Contact Information, Other Information, Customer Defined Fields, Location Information, and DirectMatch. Each section displays the available fields for the Submission Record with all the Near Matches shown side-by-side.

The Compare Records page will display one Submission Record and up to three Near Matches. If there are more than three Near Matches, the application will include left and right navigation arrows to enable pagination across all the Near Matches.

ACTION ICON	DESCRIPTION
◁	Navigate the Near Match list to the left.
▷	Navigate the Near Match list to the right. This icon will not be available if there are less than or equal to three Near Matches.

ⓘ A System Administrator can disable fields in the application. If the fields are disabled, they will not be visible. If a field is described below, but not visible then the System Administrator has disabled the field.

As noted above, a Near Match can be in one of four stages: Pending, No Match (Resolved), Match (Resolved) or Canceled (Resolved). The view of the Compare Near Match data will vary by stage, including the Status Panel described above.

The information displayed in the Submission Record details section depends on the type of Batch being reviewed by the user.

Once a Near Match has been resolved (Match, No Match, or Canceled), the Near Match actions are no longer available/visible.

RESOLVED - Match: Action Buttons Not Available

Compare Records
The Near Match ... d are displayed below.

SNAP — Match Type 920 — Batch ID 800 — Transaction ID ✅ Resolved

Match Decision

The submission record was matched
Resolved by: Andrea Hartman ...

View Pending Near Match List
Vie...

SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEA...
SOURCE: Person ID	✅ SOURCE: SNAP	SOURCE: SNAP	SOURCE: ...
	Match Score	Match Score	Match Score
	Matched ID 981840401	**No Match**	**No Match**

Matching Fields

First Name
Oliver | Oliver | Oliver | Oliver

Middle Name | S | | L

Last Name

RESOLVED - No Match: Action Buttons Not Available

Compare Records
The N...

SNAP — Match Type 920 — Batch ID 800 — Transaction ID ✅ Resolved

No Match Decision (No M...ord)

The submission record was not match...
...by: Andrea Hartm...

View Home Page

SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEA...
SOURCE: Person ID	SOURCE: SNAP	SOURCE: SNAP	SOURCE:...
	Match Score	Match Score	Match Score
	No Match	**No Match**	**No Match**

Matching Fields

First Name
Oliver | Oliver | Oliver | Oliver

Middle Name | S | | L

Last Name

Batch Comparison to a State Batch

FIELDS/DATA	BATCH	STATE BATCH
Submission Record	- Submission Record label - Source Tag: - Person ID - Upload File - Individual Match	- Submission Record label - Source Tag: - Program Index Name such as SNAP, TANF, or Foster

FIELDS/DATA	BATCH	STATE BATCH
	SUBMISSION RECORD SOURCE: Person ID	**SUBMISSION RECORD** SOURCE: SNAP
Near Match Details	▪ Near Match Record label ▪ Source: 　▪ Program Index Name ▪ Match Button with *Program Index Client Identifier* NEAR MATCH RECORD SOURCE: SNAP 94% Match Score Match: ID 9818404011	▪ Near Match Record label ▪ Source: 　▪ Person ID ▪ Match Button with *Master Record Unique Identifier* NEAR MATCH RECORD SOURCE: Person ID 94% Match Score Match: ID 9818404011

Batch Compare Records

State Batch Compare Records

Matching Fields

The Matching Fields section specifically lists all the fields that may have been used for matching purposes. These fields are important to list first because they will help the user decide on the Near Match. The Matching Fields are:

FIELDS/DATA	DESCRIPTION
First Name	Lists the First Name for the Submission Record and each Near Match (Master).
Middle Name	Lists the Middle Name for the Submission Record and each Near Match.
Last Name	Lists the Last Name for the Submission Record and each Near Match.
Suffix Name	Lists the Suffix Name for the Submission Record and each Near Match.

FIELDS/DATA	DESCRIPTION
Alternate Last Name	Lists the Alternate Name for the Submission Record and each Near Match.
Gender	Lists the Gender for the Submission Record and each Near Match.
DOB	Displays the Date of Birth for the Submission Record and each Near Match.
SSN	Lists the Social Security Number for the Submission Record and each Near Match. NOTE: This field may be masked.

Person Information

The Person Information section lists demographic data about the person. These fields are not used in the Matching Process. The fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Ethnicity	Displays the Ethnicity for the Submission Record and each Near Match.
Race	Displays the Race for the Submission Record and each Near Match.
Race 2	Displays the Race 2 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Race 3	Displays the Race 3 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Race 4	Displays the Race 4 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

FIELDS/DATA	DESCRIPTION
Race 5	Displays the Race 5 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Ethnic Subgroup	Displays the Ethnic Subgroup for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

Contact Information

The Contact Information section lists contact data for the person. These fields are not used in the Matching Process. The fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Address 1	Displays the Address for the Submission Record and each Near Match.
Address 2	Displays the Address 2 for the Submission Record and each Near Match.
City	Displays the City for the Submission Record and each Near Match.
State	Displays the State for the Submission Record and each Near Match.
Zip	Displays the Zip Code for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

Location Information

The Location Information section lists district and school data for the person. These fields are not used in the Matching Process. These fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Person Type	Displays the Student for the Submission Record and each Near Match.
School Year	Displays the School Year for the Submission Record and each Near Match.
District Code	Displays the District Code for the Submission Record and each Near Match.
School Code	Displays the School Code for the Submission Record and each Near Match.
Resident Location	Displays the Resident Location for the Submission Record and each Near Match.
Local ID	Displays the Local ID related to the Source System that submitted the data for the Submission Record and each Near Match.
Source	Displays the Source System that submitted the data for the Submission Record and each Near Match. It is related to the Local ID.
Grade	Displays the Grade Level for the Submission Record and each Near Match.

DirectMatch

The DirectMatch section lists fields that are specific to the DirectMatch process for the person. These fields are not used in the Matching Process. These fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are dependent on the Program Index and may change when viewing different Match Types.

Lesson: How to Access the Near Match List

1. Navigate to the Dashboard or Match History component.

2. Locate a "Resolve" link for a Transaction or Batch.

The Multiple Actions Icon will display a menu with Resolve as an option.

	Batch ID	Status Info		Actions
	925	Pending: Request Received		Refresh
	922	Pending: In Progress		
	921	Pending: Request Queued		Resolve
	918	Pending: Near Matches		Resolve
	918	Pending: Errors		Download
	Batch ID	Status Info		View Transaction Det...

3. Click the Resolve link to access the Near Matches for the specific Batch or Transaction.

4. The application will display the Near Match List page with the selected Batch or Transaction Near Match displayed.

Lesson: How to Filter the Near Match List

1. Navigate to the Near Match List page as described above.

2. By default, the application will display the Batch or Transaction that was selected on the prior page, but this information can be removed in order to apply different filters. The application will display the available filters as described above. See Near Match List filters.

3. Enter or select the appropriate filters.

4. Click the Filter Data button to apply the filters to the list.

5. The application will update the Near Match List based upon the selected filters.

6. Click the Reset link to reset the filter options.

Lesson: How to Resolve Near Match

1. Navigate to the Near Match List page as described above.

2. Review the Resolve Near Matches list page. Each card displays the submission record and the collapsible section displays a list of Potential Matches to Program Index records.

3. Focus on one Submission Record card at one time.

4. Click the Expand icon (▽) in the Submission Record header to expand the Potential Matches to Program Index Records section.

5. The Potential Matches to Program Index Records section will display one or many Near Matches with many of the matching fields visible in the list and the Match Score. The list will be sorted by the highest matching record at the top of the list based upon the Match Score.

6. Review the Potential Matches to Program Index Records section as compared to the Submission record to determine if there are any Matches or if there are no Matches (No Match).

   a. If there are no matching records to the Submission Record in the Potential Matches to Program Index Records section, click the No Match icon (⊘) in the Submission Record header to the right of the Submission Record details. NOTE: If the No Match icon is clicked, ALL potential Near Matches will be discarded. This decision should only be made if there are no matches listed in the Potential Matches to Master Data section.

   b. If the Index Record is a Match to the Submission Record, click the Match icon (✓) in the Actions column to the right of the name to be matched.

   c. If additional information is necessary to make a Match Decision, click on the Drill In icon (≫) to navigate to the Compare Records page. This icon can be clicked from the Submission Record Header or from the Potential Matches to Master Data section, both options will navigate to the same page.

7. The Compare Records page displays the submitted person in the "Submission Record" column on the left and the Near Match Record(s) in columns on the right of the submission record column.

a. The Near Matches will be listed from left to right, with the highest and most likely match to the left and closest to the Submission Record.

b. All fields that are different between Submission Record and Near Match Records are highlighted in yellow.

c. If a near match was forced by the application, the application will list the reason for the near match within the "Match Notes" row. This may include a note about the Twins Rule, SSN Rules or other forced near match scenarios.

8. If more than three Near Matches are available, the application will display a left and right navigation icon. Click the icons to navigate between all the potential matches.

9. Review all Near Matches, including the highlighted differences and Match Score to determine if there is a Match or if there are no matches (No Match).

a. A Near Match is only resolved once, so once a decision button (Match, No Match or Cancel) is clicked, the Near Match is resolved and will disappear from the Near Match List. Once a decision is submitted, it cannot be reverted.

10. To resolve a near match a user can click on Match, No Match, or cancel the record.

a. If there are no matching records to the Submission Record in the listed Near Matches, click the No Match button (**No Match**). NOTE: If the No Match button is clicked, ALL potential Near Matches will be discarded. This decision should only be made if there are no matches listed in the Near Match details.

b. If the Index Record is a Match to the Submission Record, click the Match button (**Match: ID 9818404011**) in the Near Match column below the record to be matched. The Match button will include the Client Index ID of the Near Match (Index Record).

c. If the Submission Record should be canceled, click the "Cancel Submission Record" link.

   i. When the Cancel Submission Record link is clicked, all the pending near match will be canceled. If a pending near match is canceled, no

match determination is made, and the record must be resubmitted to the application.

🔖 Search Options

Overview

The Search Options feature enables users to search for students by identifier, Match Type, District, School and/or School Year and to download the results. The Search page includes the Search Form and Search Results sections. Each option is described below.

The Search feature was formerly called "My Students".

Search Form

The Search form includes several fields to locate a specific student and/or group of students.
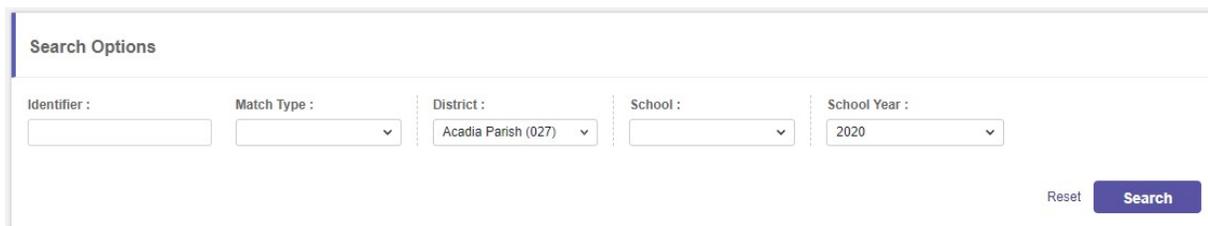
FIELDS/DATA	DESCRIPTION
Identifier	When searching for a specific student, a State ID can be entered into this field to restrict the results to a specific student.

FIELDS/DATA	DESCRIPTION
Match Type	The Match Type selector searches for students with an existing Match Record for the selected Match Type(s). One Match Type must be selected.
District	The District selector searches for students currently enrolled in the selected District with an existing Match Record. In order to Download, at least one District must be selected.
School	The School selector searches for students currently enrolled in the selected School with an existing Match Record.
School Year	The School Year selector searches for students with an existing Match Record.
Reset Link	The Reset link button will reset the search form to the default values.
Search	The Search button will submit the search request using the search criteria.

Search Result

Once a search is initiated the application will display the Search Results matching the search criteria. The Search Results panel includes a Download icon and will each result record will include details about the students.

FIELDS/DATA	DESCRIPTION
Download Icon	The Download Icon button will generate a download file based on the search criteria that was submitted. When clicked, the

FIELDS/DATA	DESCRIPTION
	Search Information page will be displayed with the Download Options available.
State ID	Displays the State ID.
Name	Displays the First and Last Name.
DOB	Displays the Date of Birth.
Gender	Displays the Gender.
Grade	Displays the current Grade.
Location Info	Displays the District Name, District Code, School Name and School Code.
ID Info	Displays the Local ID and Source System.
Eligibility Types	Displays all programs the student has matched, including those not selected in Match Type.
Earliest Identified Date	Displays the earliest date the student was identified as eligible.
Actions	» Drill-In: Allows the user to drill into the Person Profile – DirectMatch of the selected person.

No Records Found

If no matches are found for the search criteria, the application displays a message below the search form indicating that no matches were found. When this occurs, users should adjust the search criteria and re-submit the form.

Download - Search Information

The Search Information profile displays the Search Date, Search Result count and a Download Options panel. The Download Options panel includes a download form for the user to customize the download file.

FIELDS/DATA	DESCRIPTION
File Format	Provides a list of download format options, including Version 3.0, Version 3.0+, and DirectMatch Index. One button/option must be selected. DirectMatch Index is the default download option.
Delimiter	Provides a list of download delimiter options, including comma or tab. One button/option must be selected.
Qualifier	Provides a list of download qualifier options, including single quote (') or double quote (") or none. One button/option must be selected.
Date Format	Provides a drop-down menu with options for the download date format. One option must be selected.
Include Header/Footer	Indicates if the header/footer are included in the download file, including Yes or No. One button/option must be selected.

FIELDS/DATA	DESCRIPTION
Generate Extract	Serves as the form submission button and will initiate the download process.

When the Download Generate Extract button is clicked, the application will display an Extract File(s) panel. This panel will list all the extracts that have been generated by the request. The Extract Files panel includes a Refresh icon ( ), Download All link and a data grid listing all the downloads.
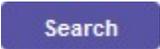

The following fields are returned in the data grid:

FIELDS/DATA	DESCRIPTION
Extract Date	Indicates the date and time the extract was initiated.
Match Type	Indicates the Match Type data included in the extract.
Location Info	Indicates the District Name, District Code, School Name, and School Code for the extract.
Match Status	Indicates "Match" as all records are considered Matches.
School Year	Indicates the School Year for the records in the extract.
Record Count	Indicates the count of records in the extract.

FIELDS/DATA	DESCRIPTION
Extract Name	Indicates the file name that was generated by the system for the extract.
Extract Status	Indicates the status of the extract, including Interrupted, In Progress or Completed. A file cannot be downloaded until it has completed the file generation process.
Actions	Provides a list of valid actions based on the status of the extract, including Refresh or Download.

Refresh – When clicked, the extract information for the specific download will be updated.

Download – When clicked, the extract will be downloaded/available. |

Lesson: How to Perform a Search

1. Click on the Search icon on the side navigation panel.

2. Select the appropriate criteria for the person you are searching using Identifier, Match Type, District, School, School Year.

3. Click the Search button. **Search**

4. The Search results will be displayed.

Lesson: How to Download Details

1. Search for students using the How to Search above.

2. Click on the Download icon (📥) to view the Search Information – Download Page.

3. The application will display the Search Information – Download page which includes a Download form.

4. Select the appropriate form values.

5. Click Generate Extract.

6. The application will display a list of extracts generated by the request. This may be one or many extracts, depending on the download request.

7. Click the Download link in the Extract File(s) panel for the specific download request.

8. The application will prompt the user to save the file or depending on web browser settings may automatically download the file.

Lesson: How to View Match History Details

1. Search for students using the How to Search above.

2. Click on the Drill in icon (») to view the Person Profile - DirectMatch.

3. The application will display the Person Profile – DirectMatch tab which includes the Index Date, Date Matched among other fields. This tab can be used to view any "Match" a student has to a Program Index/Match Type.

Matched DirectMatch Records

Index Date	Date Matched	School Year	Match Type	Decision	DSS	Match Option	Location Info	Local ID	Source	Transaction Info
09/01/2020	09/05/2020	2020	SNAP	Match	9928822	Manual Authorization	Acadia Parish (027) *Brownfields Elementary School (027011)*	1234	MDE	1123
09/01/2020	09/05/2020	2020	Foster	Match	883838	Address Match	Acadia Parish (027) *Brownfields Elementary School (027011)*	3422	SIS	234
09/01/2020	09/05/2020	2020	SNAP	Match	0002828	Upload File	Acadia Parish (027) *Brownfields Elementary School (027011)*	111	MDE	123
09/01/2020	09/05/2020	2020	TANF	Match	747	Person ID	Acadia Parish (027) *Brownfields Elementary School (027011)*	156	SIS	44

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🔖 Person Profile

Chapter Highlights

- ▪ [Overview](#)
- ▪ [Person Profile Header](#)
- ▪ [Person Profile – Master Record Tab](#)
- ▪ [Person Profile – DirectMatch Tab](#)

Overview

The Person Profile feature enables users to view specific details about a student, including person information, match history, and other details. This feature offers a complete picture of the student including the Master Record and any historical information that may be available for the student.

The Person Profile is accessible throughout the application wherever the person name is shown as a link, such as on the Search Results page. Most users can view a person profile, but only authorized users are able to edit a Person Profile.

The Person Profile consists of a Person Profile Header and four tabs of specific content, including the Overview, Master Record, History Records, and DirectMatch tabs. Each of these are described in detail below.

A System Administrator can configure field display labels and/or disable fields, so the columns/field labels described below may vary based upon those configured values. For example, the Alternate Last Name field may be disabled and therefore not visible on the Master Record tab view.

Person Profile Header

The Person Profile Header appears at the top of the Person Profile and will remain the same, even when changing tabs. This information enables the user to view important information about the person.

FIELDS/DATA	DESCRIPTION
Person Name	Displays the First Name, Middle Name, and Last Name of the selected person.

FIELDS/DATA	DESCRIPTION
Person Type(s)	Displays all the person types for the person. For DirectMatch profiles, the Person Type will always be Student.
State ID	Displays the unique State ID for the student.
Last Update Date	Displays the date the Master Record was last updated for the selected person.
Pending Near Matches	Displays the count of pending Near Matches for the selected person.
School Year	Displays the most recent school year when the Master Record was updated.

Person Profile - Overview Tab

The Overview tab serves as a dashboard for the selected person and includes Master Record Highlights, Recent History Records, and Pending Near Matches panels.
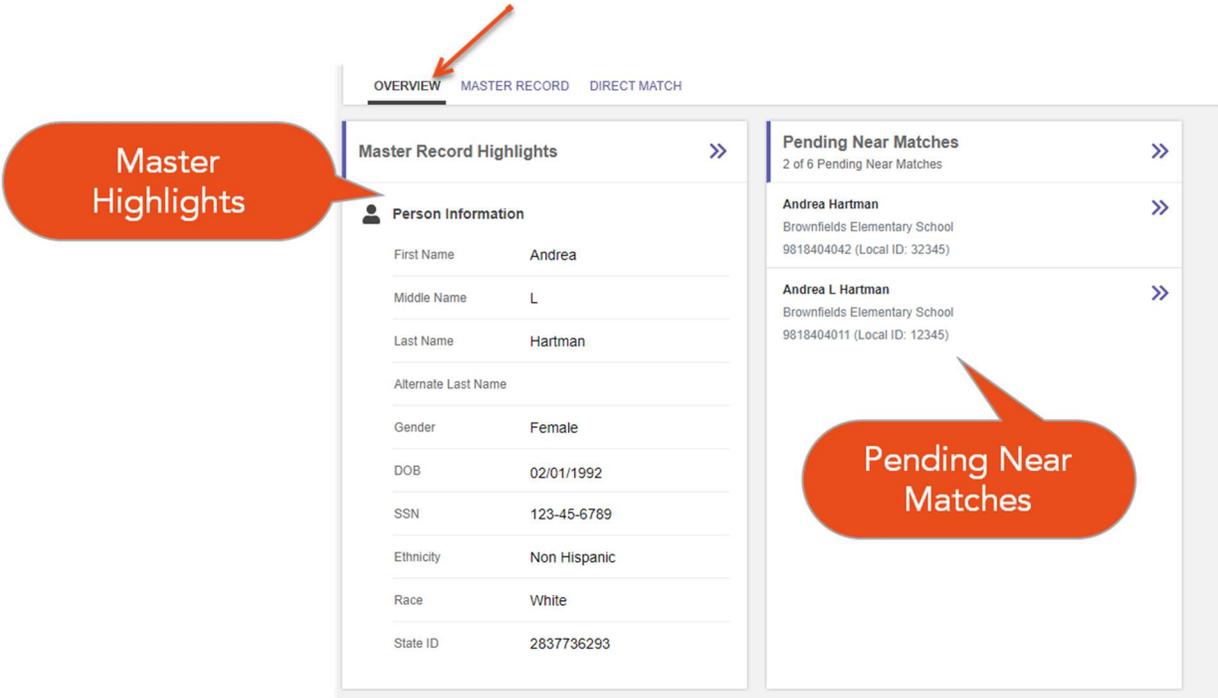
Master Record Highlights

The Master Record Highlights includes a Drill In icon button (») and Person Information. When the Drill In icon is clicked, the application will navigate to the Master Record tab. The Person Information section includes the First Name, Middle Name, Last Name, Alternate Name, Gender, DOB, SSN, Ethnicity, Race, and State ID data from the Master Record.

Pending Near Matches

The Pending Near Matches panel includes a Drill In icon button (») and list of the 6 most recent pending near matches. When the Drill In icon is clicked, the application will navigate to the Near Match List page. The Pending Near Match list section includes the Name, School, State ID, and Local ID for each pending near match. The Actions column includes a Drill In icon button (») which will navigate to the Near Match List page for the selected Pending Near Match.

Person Profile – Master Record Tab

The Person Profile – Master Record tab displays the Master Record which is the most recently updated data for the student. The content on the page is categorized into Person Details, Location Information, Matching Information, and Transaction Information. Each of these panels is described in detail below.

Person Details Panel

The Person Details Panel includes the Person Information, Contact Information, Other Information, and Customer Defined Fields sub-sections. The fields available in the Person Details Panel are:

Person Information

FIELDS/DATA	DESCRIPTION
First Name	Displays the legal first name of the student. Used for Matching.

FIELDS/DATA	DESCRIPTION
Middle Name	Displays the legal middle name of the student. Used for Matching if provided.
Last Name	Displays the legal last name of the student. Used for Matching.
Suffix	Displays the suffix used for the student. Used for Matching if provided.
Alternate Last Name	Displays the alternate last name that may have been used for the student. Used for Matching if provided.
Nickname	Displays the nickname that may have been used for the student.
Gender	Displays the gender for the student. Used for Matching.
DOB	Displays the date of birth for the student. Used for Matching.
SSN	Displays the Social Security Number for the student. Used for Matching if provided.
Ethnicity	Displays the ethnicity for the student.
Race, Race 2-5	Displays the race for the student.
Ethnic Subgroup	Displays the Ethnic Subgroup for the student.
State ID	Displays the State ID assigned to the student.

Contact Information

FIELDS/DATA	DESCRIPTION	EDIT MODE DETAILS

Address 1	Displays the Address 1 for the student.	Textbox. Optional by default but may be required by a System Administrator.
Address 2	Displays the Address 2 for the student.	Textbox. Optional by default but may be required by a System Administrator.
City	Displays the City for the student.	Textbox. Optional by default but may be required by a System Administrator.
State	Displays the State for the student.	Drop down menu with valid state options. Must select one option. Optional by default but may be required by a System Administrator.
Zip	Displays the Zip Code for the student.	Textbox. Optional by default but may be required by a System Administrator.
Geocode	Displays the Geocode for the student.	Textbox. Optional by default but may be required by a System Administrator.

Other Information

FIELDS/DATA	DESCRIPTION	EDIT MODE DETAILS
Birth Location	Displays the Birth Location for the student.	Textbox. Optional by default but may be required by a System Administrator.
Residence Status	Displays the Residence Status for the student.	Drop down menu with valid residence status options. Optional by default but may be required by a System Administrator.

		MM/DD/YYYY Date picker with a calendar selection. Optional by default but may be required by a System Administrator.
Residence Expiration Date	Displays the Residence Expiration Date for the student.	MM/DD/YYYY Date picker with a calendar selection. Optional by default but may be required by a System Administrator.
Mother's Maiden Name	Displays the Mother's Maiden Name for the student.	Textbox. Optional by default but may be required by a System Administrator.

Customer Defined Fields

FIELDS/DATA	DESCRIPTION	EDIT MODE DETAILS
CDF 1 – 8	Displays the Customer Defined Fields submitted for the person. The Customer Defined Fields will have special labels dependent on the configuration of the system.	Textbox. Optional by default but may be required by a System Administrator.
CDF Date 1	Displays the Customer Defined Field Date 1 submitted for the person.	Textbox. Optional by default but may be required by a System Administrator.
CDF Number 1	Displays the Customer Defined Field Number 1 submitted for the person.	Textbox. Optional by default but may be required by a System Administrator.
CDF Code 1	Displays the Customer Defined Field Code 1 submitted for the person.	Textbox. Optional by default but may be required by a System Administrator.

Location Information Panel

The Location Information Panel includes a listing of the locations where the student is currently enrolled. The fields available in the Locations list are:

FIELDS/DATA	DESCRIPTION
Update Date	Displays the date the location information was updated for the student.
School Year	Displays the school year associated with the location record for the student.
Location Information	Displays the District Name, District Code, School Name and School Code for the location.
ID Info	Displays the Local Identifier and the Source System for the identifier for the location.
Alternate ID	Displays the alternate ID with the location record for the student. This column may be blank.
Grade	Displays the grade level associated with the location record for the student.
Status	Displays the status for student at the location record.

Person Profile – DirectMatch Tab

The Person Profile – DirectMatch Tab feature displays all "Matched" records that have been generated for the student for DirectMatch programs. The list can include matches that were created with a Person ID, Upload File, Individual Match, Manual Match or Address Match.

FIELDS/DATA	DESCRIPTION
Index Date	Displays the date the Program Index was created in the application.
Date Matched	Displays the date the record was matched to the Program Index Record.
School Year	Displays the School Year for the matched program.
Match Type	Displays the Program Index name/Match Type of the eligible matched program, such as SNAP or TANF.
Decision	Displays "Match" for all records.
DSS	Displays the value for the client ID from the index file.
Match Options	Displays the option Match Option that was selected during the submission process, including Person ID, Upload File, Individual Match, Manual Authorization, and Address Match.
Location Info	Displays the District Name, District Code, School Name, and School Code of the student at the time of the update. The Location Information is clickable and will navigate to the Location Profile when clicked.
Local ID	Displays the Local Identifier that was submitted with the Submission Record.
Source System	Displays the Source System that was submitted with the Submission Record.
Transaction Info	Displays the Transaction ID as a link. This is clickable and will navigate to the Transaction Profile when clicked.

◼ Transaction Profile

Chapter Highlights

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- [Profile Header](#)
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Overview

The Transaction Profile displays details about the specific Transaction record enabling users to understand when the Transaction occurred and the current status, along with other details. This feature includes a Profile Header, Details Tab and Download Tab. The Details Tab include the Process Details, Next Steps and General Information panels. Each panel is described in detail below. The Download Tab enables users to download the Transaction.

The Transaction Profile page can be accessed for any Transaction by clicking the Transaction ID link. This link is displayed throughout the application, including on the Dashboard, Match History and Near Match List pages.

Profile Header

The Transaction Profile Header displays a page title, Transaction details, action button, and Details and Download tab links for the Transaction.

Transaction Profile
Contains one record.

| 924 | Web Services | 04/06/2020 3:00 PM | 925 | Completed |
| Transaction ID | Submission Type | Process Info | Related Batch | Status |

DETAILS   DOWNLOAD

FIELDS/DATA	DESCRIPTION
Transaction ID	Displays the Transaction Identifier for the selected Transaction. Each Transaction is assigned a unique identifier and can be referenced/searched for from the Match History component.
Submission Type	Displays the option Match Option that was selected during the submission process, including Person ID, Upload File, Individual Match, Manual Authorization, and Address Match.
Process Info	Displays the date and time the Transaction was submitted.
Related Batch	If the Transaction is part of a Batch, the Batch Identifier will be displayed. If the Transaction was a single Transaction, no Batch Identifier will be displayed.
Status	Displays the current status of the Transaction.
Details Tab	This is a link to view the Details content as described below.
Download Tab	This is a link to view the Download content as described below.

Details Tab

The Details tab includes Process Details, Next Steps and General Information panels as described below.

Process Details

The Process Details panel includes information about the Transaction process, such as the Status Statistics and Processing Stage. These sections provide the users with details about Match Decision statistics and the Transaction Status as described below.

Status Statistics

The Status Statistics displays a breakdown of the Transaction Status for the Match Status and Record Count per status. Since a Transaction is a single record, the Status Statistics should display only one status for the record, such as Match with a record count of 1.

Processing Stage

The Processing Stage section displays a breakdown of the Stage and Processing Date for the Stage. The Processing Stages are specific stages the Submission Record passed through during the submission process, including validation, matching, and other stages. The information displayed in this section helps determine when a stage started and ended.

Next Steps

The Next Steps panel provides access to any actions that are available for the Transaction. The Next Steps that may available are:

NEXT ACTION	DESCRIPTION
Continue	Indicates the Transaction is not completed and is in a pause status and must be continued for it to finish processing.
Refresh	Indicates the Transaction is not completed and is in a pending status. The Refresh action will refresh the status of the Transaction. The Transaction will continue processing even if this action is not clicked.
Resolve	Indicates the Transaction is not completed and that there is at least one pending Near Match for the Transaction and it must be resolved by a user for the Transaction to complete.
Download	Indicates the Transaction has completed and can be downloaded. When the Download link is clicked, the application will navigate to the Download tab.

NEXT ACTION	DESCRIPTION
View Batch Profile	If the Transaction is associated to a Batch, the View Batch Profile link will be available. If this link is not visible, the Transaction is not associated to a Batch.

General Information

The General Information panel provides specifics about the Transaction, such as the user who submitted the Transaction. The data displayed in this section includes:

FIELDS/DATA	DESCRIPTION
Match Type	Displays the Program Index name/Match Type of the eligible matched program, such as SNAP or TANF.
District	Displays the District Name and Code associated to the Submission Record/Transaction.
School	Displays the School Name and Code associated to the Submission Record/Transaction.
Extract Date	Not applicable to DirectMatch.
Extract File	Not applicable to DirectMatch.
Transmission ID	Not applicable to DirectMatch.
Source	Displays the Source Name associated to the Submission Record/Transaction.
Creation Date	Displays the date the Submission Record/Transaction was created.
Creation User	Displays the user information for the user who created the Submission Record/Transaction.

FIELDS/DATA	DESCRIPTION
Delimiter (Record)	Displays the Delimiter for the Detail Record associated to the Submission Record/Transaction. This is used for Upload File submissions.
Delimiter (Header)	Displays the Delimiter for the Header Record associated to the Submission Record/Transaction. This is used for Upload File submissions.
File Version	Displays the File Format used to submit the Submission Record/Transaction.

Download Tab

The Download tab provides access to download the Transaction Record and includes Download Options and Download History panels.

Download Options

The Download with Options functionality allows users to select specific download options, such as the extract template, field delimiter, field qualifier, date format and whether to include the header/footer in the file.

The Download Options panel includes a Match Status section to specify the Match Status to download and Format section to specify the format of the download file.

FIELDS/DATA	DESCRIPTION
Match Status	For a Transaction the Match Status section will include one match option such as Match. This section includes the Status, Match Date, Status Record Count, and Total Count. For a Transaction, these counts should be 1.
File Format	Provides a list of download format options, including Version 3.0, Version 3.0+, and DirectMatch Index. One button/option must be selected. Ready to Resolve Near Matches and Canceled Status Match Statuses must be downloaded in File Format 3.0.
Delimiter	Provides a list of download delimiter options, including comma or tab. One button/option must be selected.
Qualifier	Provides a list of download qualifier options, including single quote (') or double quote (") or none. One button/option must be selected.
Date Format	Provides a drop-down menu with options for the download date format. One option must be selected.
Include Header/Footer	Indicates if the header/footer are included in the download file, including Yes or No. One button/option must be selected.
Generate Extract	Serves as the form submission button and will initiate the download process.

When the Download Generate Extract button is clicked, the application will display an Extract File(s) panel. This panel will list all the extracts that have been generated by the

request. The Extract Files panel includes a Refresh icon ( ), Download All link and a data grid listing all the downloads.

The format of the downloaded file will match the extract file selected in the File Format option.

Download History

The Download History panel will list a record of each time the Transaction was downloaded by a user, including the user and date the download was generated.

Lesson: How to Access a Transaction Profile

1. Click on a Transaction ID link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

2. The application will navigate to the Transaction Profile for the selected Transaction.

3. View the Details and Download tabs as necessary.

Lesson: How to Generate Extract File from Download Options

1. Access a Transaction Profile as described above.

2. Select the appropriate Match Status records to extract using the radio button. Only one status at a time can be downloaded.

Match Status

	Status	Match Date	Status Record Count	Total Record Count
⦿	Match	04/23/2020 13:48	1	1

3. Click the button/option for each field in the Download Options section, such as the File Format and Delimiter.

Format

File Format	Version 3.0	Version 3.0+	DirectMatch Index

Delimiter	Tab	Comma

Qualifier	Double Quotes (")	Single Quote (')	none

Date Format	mm/dd/yyyy ⌄

Include Header/Footer	Yes	No

4. Click Generate Extract.

Generate Extract

5. The application will display a list of extracts generated by the request. This may be one or many extracts, depending on the download request.

Extract File (1)   🔁 Download All

Extract Date	Match Type ▲	Location Info ▲	Match Status	Record Count	Extract Name	Extract Status	Actions
04/06/2020 3:00 PM	SNAP	Acadia Parish (027) *Brownfields Elementary School (027018)*	Match	1 of 1	extract_06082020.txt	Completed	Download

6. Click the Download link in the Extract File(s) panel for the specific download request.

7. The application will prompt the user to save the file or the web browser may automatically download the file. This step is dependent on the computer and system, not the application.

▮ Batch Profile

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- [Profile Header](#)
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Overview

The Batch Profile displays details about the specific Batch enabling users to understand when the Batch occurred and the current status, along with other details. This feature includes a Profile Header, Details Tab and Download Tab. The Details Tab include the Process Details, Next Steps and General Information panels. Each panel is described in detail below. The Download Tab enables users to download the Batch.

The Batch Profile page can be accessed for any Batch by clicking the Batch ID link. This link is displayed throughout the application, including on the Dashboard, Match History and Near Match List pages.

Profile Header

The Batch Profile Header displays a page title, Batch details, action button, and Details and Download tab links for the Batch.

FIELDS/DATA	DESCRIPTION
Batch ID	Displays the Batch Identifier for the selected Batch. Each Batch is assigned a unique identifier and can be referenced/searched for from the Match History component.
Submission Type	Displays the option Match Option that was selected during the submission process, including Person ID, Upload File, Individual Match, Manual Authorization, and Address Match.
Process Info	Displays the date and time the Batch was submitted.
Status	Displays the current status of the Batch.
Details Tab	This is a link to view the Details content as described below.
Download Tab	This is a link to view the Download content as described below.

Details Tab

The Details tab includes Process Details, Next Steps and General Information panels as described below.

Process Details

The Process Details panel includes information about the Transaction process, such as the Status Statistics and Processing Stage. These sections provide the users with details about Match Decision statistics and the Batch Status as described below.

Status Statistics

The Status Statistics displays a breakdown of the Transaction Status for the Match Status and Record Count per status.

Processing Stage

The Processing Stage section displays a breakdown of the Stage and Processing Date for the Stage. The Processing Stages are specific stages the Submission Record passed through during the submission process, including validation, matching, and other stages. The information displayed in this section helps determine when a stage started and ended.

Next Steps

The Next Steps panel provides access to any actions that are available for the Batch. The Next Steps that may available are:

NEXT ACTION	DESCRIPTION
Continue	Indicates the Batch is not completed and is in a pause status and must be continued for it to finish processing.
Refresh	Indicates the Batch is not completed and is in a pending status. The Refresh action will refresh the status of the Transaction. The Batch will continue processing even if this action is not clicked.
Resolve	Indicates the Batch is not completed and that there is at least one pending Near Match for the Transaction and it must be resolved by a user for the Transaction to complete.
Download	Indicates the Batch has completed and can be downloaded. When the Download link is clicked, the application will navigate to the Download tab.
View Transactions	Each Batch may have one or many Transactions. When this link is clicked, the application will navigate to the Match History page with a filter for the specific Transaction.

General Information

The General Information panel provides specifics about the Batch, such as the user who submitted the Batch. The data displayed in this section includes:

FIELDS/DATA	DESCRIPTION
Match Type	Displays the Program Index name/Match Type of the eligible matched program, such as SNAP or TANF.
District	Displays the District Name and Code associated to the Submission Record/Transaction/Batch.
School	Displays the School Name and Code associated to the Submission Record/Transaction/Batch.
Extract Date	Not applicable to DirectMatch.
Extract File	Not applicable to DirectMatch.

FIELDS/DATA	DESCRIPTION
Transmission ID	Not applicable to DirectMatch.
Source	Displays the Source Name associated to the Submission Record/Transaction/Batch
Creation Date	Displays the date the Submission Record/Transaction/Batch was created.
Creation User	Displays the user information for the user who created the Submission Record/Transaction/Batch.
Delimiter (Record)	Displays the Delimiter for the Detail Record associated to the Submission Record/Transaction/Batch. This is used for Upload File submissions.
Delimiter (Header)	Displays the Delimiter for the Header Record associated to the Submission Record/Transaction/Batch. This is used for Upload File submissions.
File Version	Displays the File Format used to submit the Submission Record/Transaction/Batch.

Download Tab

The Download tab provides access to download the Batch and includes Download Options and Download History panels.

Download Options

The Download with Options functionality allows users to select specific download options, such as the extract template, field delimiter, field qualifier, date format and whether to include the header/footer in the file.

The Download Options panel includes a Match Status section to specify the Match Status to download and Format section to specify the format of the download file.

FIELDS/DATA	DESCRIPTION
Match Status	The Match Status section will include all the available Match Status for the Batch, including Match, Ready to Resolve Near Matches and others. This section includes the Status, Match Date, Status Record Count, and Total Count. The Status Record Count totals are shown for each Match Status and may vary, while the Total Record Count should be consistent. It is the total count of records in the Batch.
File Format	Provides a list of download format options, including Version 3.0, Version 3.0+, and DirectMatch Index. One button/option

FIELDS/DATA	DESCRIPTION
	must be selected. Ready to Resolve Near Matches and Canceled Status Match Statuses must be downloaded in File Format 3.0.
Delimiter	Provides a list of download delimiter options, including comma or tab. One button/option must be selected.
Qualifier	Provides a list of download qualifier options, including single quote (') or double quote ("). One button/option must be selected.
Date Format	Provides a drop-down menu with options for the download date format. One option must be selected.
Include Header/Footer	Indicates if the header/footer are included in the download file, including Yes or No. One button/option must be selected.
Generate Extract	Serves as the form submission button and will initiate the download process.

When the Download Generate Extract button is clicked, the application will display an Extract File(s) panel. This panel will list all the extracts that have been generated by the request. The Extract Files panel includes a Refresh icon (), Download All link and a data grid listing all downloads.

The format of the downloaded file will match the extract file selected in the File Format option.

Download History

The Download History panel will list a record of each time the Batch was downloaded by a user, including the user and date the download was generated.
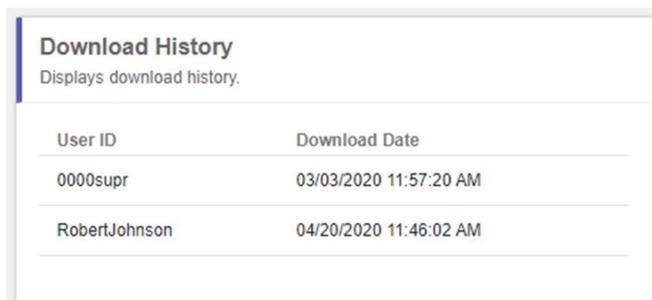
Download History
Displays download history.

User ID	Download Date
0000supr	03/03/2020 11:57:20 AM
RobertJohnson	04/20/2020 11:46:02 AM

Lesson: How to Access a Batch Profile

1. Click on a Batch ID link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

2. The application will navigate to the Batch Profile for the selected Batch.

3. View the Details and Download tabs as necessary.

Lesson: How to Generate Extract File from Download Options

1. Access a Batch Profile as described above.

2. Select the appropriate Match Status records to extract using the radio button. Only one status at a time can be downloaded.

3. Select the Download Options, such as the File Format and Delimiter.

4. Click Generate Extract.

Generate Extract

5. The application will display a list of extracts generated by the request. This may be one or many extracts, depending on the download request.

Extract File (1)							⟳ Download All
Extract Date ⇅	Match Type ▲	Location Info ▲	Match Status ⇅	Record Count ⇅	Extract Name ⇅	Extract Status ⇅	Actions
04/06/2020 3:00 PM	SNAP	Acadia Parish (027) *Brownfields Elementary School (027018)*	Cancelled	2 of 2	extract_06082020.txt	Completed	Download

6. Click the Download link in the Extract File(s) panel for the specific download request.

Extract File (1)							Actions
Extract Date ⇅	Match Type ▲	Location Info ▲	Match Status ⇅	Record Count ⇅	Extract Name ⇅	Extra	Download
04/06/2020 3:00 PM	SNAP	Acadia Parish (027) *Brownfields Elementary School (027018)*	Cancelled	2 of 2	extract_06082020.txt	Comp	

8. The application will prompt the user to save the file or the web browser may automatically download the file. This step is dependent on the computer and system, not the application.

▣ Location Profile

Chapter Highlights

- Overview
- [Profile Header](Profile%20Header)
- [Details Tab](Details%20Tab)

Overview

The Location Profile provides details about a specific location in the application. This profile includes a Profile Header and Details Tab as described below. A Location can be a District or School. The Location Profile is available to all users by clicking the District Name or School Name link throughout the application.

Profile Header

The Location Profile Header displays the Location Name, Address, Contact Email, Contact Phone, Status, Start Date, End Date, action button, and a Details tab.

FIELDS/DATA	DESCRIPTION
Location Name	Displays the full name, current Address 1, City, State, and Zip Code for the selected location.
Contact Email	Displays the email address for the contact person within the location.
Contact Phone	Displays the contact phone number the location.
Status	Displays the current status of the Location including Active or Inactive.
Start Date	Displays the recorded start date for the location.
End Date	Displays the recorded end date for the location. If no end date is available, "N/A" will be displayed.
Details Tab	This is a link to view the Details content as described below.

Details Tab

The Details tab includes a General Information panel which includes Location Details and Contact Information sections.

General Information

The General Information panel includes detailed information about the location, such as the location name and address information as described below.

FIELDS/DATA	DESCRIPTION
Name	Displays the full name for the selected location. If the location is a School, the District name will also be displayed.
Code	Displays the local code for the selected location.
Address	Displays the street address for the selected location.
City	Displays the city for the selected location.
State	Displays the state for the selected location.
Zip	Displays the zip code for the selected location.

Contact Information

The Contact Information panel includes detailed contact information for the location, such as the name and contact information as described below.

FIELDS/DATA	DESCRIPTION
First Name	Displays the First Name of the contact person for the selected location.
Last Name	Displays the Last Name of the contact person for the selected location.
Title	Displays the Title of the contact person for the selected location.
Email	Displays the email address for the contact person for the selected location.
Email 2	Displays a secondary email address for the selected location.
Phone	Displays the contact phone number the location.

FIELDS/DATA	DESCRIPTION
Fax	Displays the contact fax number the location.

Lesson: How to Access a Location Profile

1. Click on a Location Name link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

2. The application will navigate to the Location Profile for the selected Location.

3. View the Details and Download tabs as necessary.

🔖 CEP Manager (SFAs)

Chapter Highlights

- Overview
- Population Tab
- Elections Tab
- Recalculate

Overview

In this module, authorized users can view and submit Population and Elections data for the Community Eligibility Provision process which enables districts to get reimbursed for meal programs based on the percentage of students eligible for free meals. Students must participate in specific programs such as Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF) to be considered as an Identified Student. These direct certifications can be accomplished using a match options of Person ID, Upload File, Individual Match, Manual Authorization, or Address Match to match to an approved program.

Identified students are students approved as eligible for free meals who are not subject to verification due to their participation in available programs. The identified student counts presented to the user are directly sourced from the match results found in DirectMatch that were initiated by a user with one of the Match Options, or that were directly sourced from third party vendors.

Authorized users will not be able to directly edit any of the counts in the CEP Manager module. If students should be added to the identified student counts, users will have to utilize one of the proper matching options (e.g., Address Matching or Manual Authorization) to add a specific program match/eligibility.

The CEP Manager component includes a panel bar which includes links to the Population and Elections tabs, a Location Header, and Year Selector at the top of page and an Instructions panel and a My Activity panel at the bottom of the page.

FIELDS/DATA	DESCRIPTION
Populations Tab Link	Links to the Population tab of the CEP Manager component. When clicked, the application will navigate to the Population tab.
Elections Tab Link	Links to the Elections tab of the CEP Manager component. When clicked, the application will navigate to the Elections tab.
Location Header - SFA Name	Displays the School Food Authorities (SFAs) Group Name that is currently being viewed. If the user has access to multiple SFAs, a drop-down menu selector will be available to change locations.
Location Header - Total Identified	Displays the total distinct count of identified students based upon eligibility records from DirectMatch or external sources as of April 1.
Location Header - Total Enrolled	Displays the total count of students currently enrolled at the Location as of April 1.
Location Header - ISP	Displays an Eligibility Indicator, Identified Student Percentage (ISP) for the SFA, and an ISP Trend Indicator.

FIELDS/DATA	DESCRIPTION
	Trend Indicators ↑ Current Year ISP Goes Up ↓ Current Year ISP Goes Down
Location Header - Population Status	Displays the current status of the Population. This may display the upcoming Population due date.
Location Header - Election Status	Displays the current status of the Elections. This may display the upcoming Elections due date.
Year Selector	Displays the years as button options. When a year grouping is clicked, the Population or Elections data will be filtered to display only that year grouping. 2016-17 2017-18 **2018-19**
Instructions	Displays suggested steps for completing the CEP Process.
My Activity	Displays information about DirectMatch matches, including the Last SNAP Match Date, Last DC Extended (Address) Match, Unresolved DC Extended Matches, and the Last Manual Match Date. If the count is 1 or greater for the Unresolved DC Extended Matches, the user should access Match Options: Address Match to resolve any pending Near Matches.

Population Tab

The Population Tab includes a Location Summary panel which lists all the locations within the SFA identified in the header described above. This information must be reviewed, certified, and submitted to the State for approval.

Once the data is certified and submitted to the State, the State approves or rejects the submission. If data is rejected, the State will re-open the submission and data errors will need to be corrected by the SFA. This may include updating enrollment data or eligible

student data. If the data is approved, the data will automatically be available to the State for reporting purposes. Once approved, the Population for the current year will be closed. The Population submission is due by the date listed in the CEP Header.

Population - Location Summary

The Location Summary panel includes a Refresh icon button ( ), data grid with all the locations assigned to the SFA, and form actions. The counts in the Location Summary data grid are calculated based upon the enrollment and eligibility data as of April 1. The Location Summary data grid includes the following fields:

FIELDS/DATA	DESCRIPTION
Eligibility Indicator	Displays a visual indicator for the eligibility of the specific location. The Eligibility Indicator includes three options: Eligible, Near Eligible, and Not Eligible as shown below.
School Code	Displays the Local Code for the school within the selected SFA.

FIELDS/DATA	DESCRIPTION
Location Name	Displays the Location Name for the school within the selected SFA. The school must serve both National School Lunch Program (NSLP) and School Breakfast Program (SBP).
Identified/Enrolled	Displays the distinct identified Student Count and the Enrolled Student Count.
ISP %	Displays the current ISP % for the school within the selected SFA.
Approval Status	Displays the current approval status for the location. Options include: <table><tr><td>Status</td><td>Description</td></tr><tr><td>Submitted</td><td>The SFA has submitted the certified data to the state and is awaiting state approval for the location.</td></tr><tr><td>Approved</td><td>The SFA has submitted the certified data to the state and has been approved by the state. No additional steps are required for the location.</td></tr><tr><td>Rejected</td><td>The SFA has submitted the certified data to the state but the state rejected the submission for the location. If rejected, the SFA must correct the data issues and re-submit the Population data. Any correction must have been identified prior to the April 1st deadline.</td></tr><tr><td>Pending</td><td>The SFA has not submitted the certified data to the state. The data should be submitted by the due date.</td></tr></table>

FIELDS/DATA	DESCRIPTION
Data Grid Actions	» Drill-In: Allows the user to drill into the Location Details of the selected location.
Form Actions	Displays a certification prompt and a Submit & Certify Popluation button. In order to submit the Population data to the State, the certification check box must be clicked before the Submit & Certify Population button is clicked.

Population - Location Details

The Population Details page displays a Location Header/Summary, Programs section, and Identified Students Section. This view can be used to identify specific program eligibility per program or student.

Population - Location Details - Location Header/Summary

The Location Header/Summary displays important details about the selected location.

Alice Harte Elementary Charter School *(017082)*

94/398
Identified/Enrolled

23.43
■ ISP %

⚠ Pending
Approval Status

FIELDS/DATA	DESCRIPTION
Location Name (Code)	Displays the location name and code for the selected location.
Identified/Enrolled	Displays the Identified Student Count and the Enrolled Student Count for the selected location.
ISP %	Displays the ISP Percentage and a visual indicator for the eligibility of the specific location. The Eligibility Indicator includes three options: Eligible, Near Eligible, and Not Eligible as shown below. **Eligibility Indicators** ■ Eligible (ISP >= 40%) ■ Near Eligible (30% =< ISP < 40%) ■ Not Eligible (ISP < 30 %)
Approval Status	Displays the current approval status for the location. Options include: Status / Description **Submitted** — The SFA has submitted the certified data to the state and is awaiting state approval for the location. **Approved** — The SFA has submitted the certified data to the state and has been approved by the state. No additional steps are required for the location. **Rejected** — The SFA has submitted the certified data to the state but the state rejected the submission for the location. If rejected, the

FIELDS/DATA	DESCRIPTION	
		SFA must correct the data issues and re-submit the Population data.
	Pending	The SFA has not submitted the certified data to the state. The data should be submitted by the due date.

Population - Location Details - Programs

The Programs section will display the list of eligible programs with the count of eligible students per program. The list of programs may vary across years, as eligible programs are changed/added.

Programs

DC Extended	Even Start	Foster	Head Start	Homeless/Runaway	Migrant	SNAP	TANF
2	45	7	57	15	22	135	15

Population - Location Details - Identified Students

The Identified section will display the list of eligible students with indicator of participation in a program.

Identified Students

School Code ⇕	Student ID ⇕	DC Extended ⇕	Even Start ⇕	Foster ⇕	Head Start ⇕	Homeless/ Runaway ⇕	Migrant ⇕	SNAP ⇕	TANF ⇕	Count ⇕
017082	393948989384							●		1
017082	712348989642	●								1
017082	937948981122							●		1
017082	938948981177				▲			●		2

The Identified Students section includes the following fields.

FIELDS/DATA	DESCRIPTION
School Code	Displays the school code where the student is enrolled/for the selected location.
Student ID	Displays the unique State Student Identifier for the eligible student.

FIELDS/DATA	DESCRIPTION
Programs	Displays a column for each available program. If a student is eligible for a program, the application will display a Match Type Indicator in the column. The Match Type Indicators are: Match Type Indicators ▲ Manual Match ● System Match
Count	Displays the total count of programs the student is eligible for within the available programs list.

Lesson: How to Access CEP Manager – Populations Tab

1. On the CEP Manager icon ( ) on the left side navigation bar.

2. The application will display the CEP Manager page and will default to the Population tab.

Lesson: How to Refresh Population Data

1. Access CEP Manager – Populations as described in the above lesson.

2. Click the Refresh icon ( ).

3. The application will refresh the enrollment and eligibility data based upon the latest data in the application.

Lesson: How to View Population Historical Data

1. Access CEP Manager – Populations as described in the above lesson.

2. Click on the Year Selector button for the desired year.

| 2016-17 | 2017-18 | **2018-19** |

3. The application will display the Population data for the selected year.

4. To return to the current year, click the Year Selector for the current year.

Lesson: How to Submit Population

1. Access CEP Manager – Populations as described in the above lesson.

2. Review the Location Summary data to determine that counts are accurate for each location in the list.

| Alice Harte Elementary Charter School *(017082)* | 94/398 Identified/Enrolled | 23.43 ISP % | ⓘ Pending Approval Status |

3. Drill into Location Details as necessary by clicking the Drill In icon ( ).

4. Once the numbers have been verified, click the certification prompt below the list of locations.

☐ I certify the information entered for all schools in this application is correct and, if participating, will be used for CEP population data if applicable.
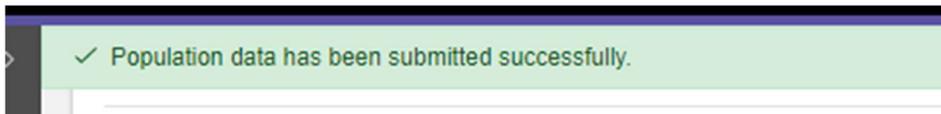
  a. By clicking the certification prompt, the user is confirming that the information being submitted is correct and accurate.

5. Click the Submit & Certify Population button.

Submit & Certify Population

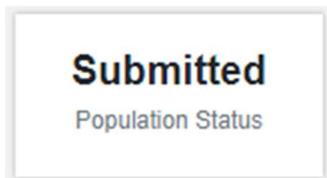6. When the form is submitted, the application will confirm a successful submission in two ways:

  a. Page Success Message – The application will display a "Population data has been submitted successfully." message at the top of the page below the main navigation bar.

✓ Population data has been submitted successfully.
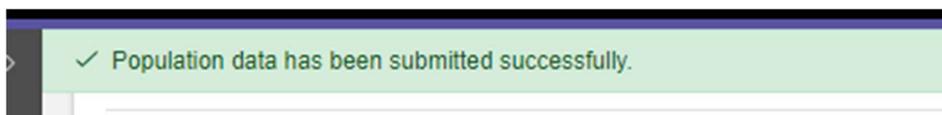
b. Approval Status Update – The application will change the Approval Status value for each location record to "Submitted".

Submitted

a. c. Location Header – Population Status Update – The application will change the Population Status on Location Header to "Submitted".
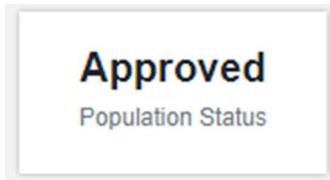
Submitted
Population Status

7. Once it is submitted, the State will need to approve or reject the submission for the process to be completed.

   a. If the State approves the submission, the Approval Status value for each location record to "Approved".

   Approved

   i. When all locations are approved by the State, the application will change the Population Status on Location Header to "Approved".

   Approved
   Population Status

   b. If the State rejects the submission, the Approval Status value for each location record to "Rejected".

   Rejected

8. If the State has approved population data for all locations and then SFA needs to resubmit population data for a location before Population Due Date, the State will need to Reject the location and Reopen Submission so that the SFA can resubmit.

9. Once the State has approved population data for all locations and it reaches Population Due Date, the Population will be closed. All actions will be disabled until Population Submission Open Date (e.g., April 1 of the following school year). In the meantime, SFA users can begin Elections process.

Lesson: How to View Location Details

1. Access CEP Manager – Populations as described in the above lesson.

2. Drill into Location Details as necessary by clicking the Drill In icon (») for the desired location.

3. View the Location Header/Summary, Programs, and Identified Students data.

4. Click the Drill Back icon («) to return to the Population tab.

Lesson: How to Resolve Rejected Records

1. If one or many of the records were rejected within a submission, the State will need to Re-Open the submission.

2. Once the submission has been re-opened, the population status on Location header will change to "Reopen". The rejected record should be corrected by updating enrollment records or eligibility records.

	School Code ⇕	Location Name ⇕	Identified/Enrolled ⇕	ISP % ⇕	Approval Status ⇕	Actions
	017082	Alice Harte Elementary Charter School	94/398	23.43	🚫 Rejected	»
	017011	Benjamin Franklin Elementary Math and Science School	255/303	84.05	🔵 Submitted	»

Location Summary

3. Once the numbers have been verified, click the certification prompt below the list of locations.

☐ I certify the information entered for all schools in this application is correct and, if participating, will be used for CEP population data if applicable.

    a. By clicking the certification prompt, the user is confirming that the information being submitted is correct and accurate.

Submit & Certify Population

4. Click the Submit & Certify Population button.

5. When the form is submitted, the application will confirm a successful submission in two ways:

    a. Page Success Message – The application will display a "Population data has been submitted successfully." message at the top of the page below the main navigation bar.

✓ Population data has been submitted successfully.

    b. Approval Status Update – The application will change the Approval Status value for each location record to "Submitted".

🔵 Submitted

    c. Location Header – Population Status Update – The application will change the Population Status on Location Header to "Submitted".

Submitted
Population Status

6. Once it is submitted, the State will need to approve or reject the submission for the process to be completed.

   a. If the State approves the submission, the Approval Status value for each location record to "Approved".

   ✅ Approved

      i. When all locations are approved by the State, the application will change the Population Status on Location Header to "Approved".

   Approved
   Population Status

   b. If the State rejects the submission, the Approval Status value for each location record to "Rejected".

   🚫 Rejected

Elections Tab

The Elections Tab enables SFAs to view elections data per location, create clusters (groups of locations), switch to Districtwide CEP after Population data is approved by the State and after Population Due Date

Cluster:

SFAs can group together sites to create "Clusters" of locations. Groups/Clusters can be created to maximize reimbursement opportunities. For example, four sites can be clustered together if the ISP for the group is 40% or above. This enables sites to be eligible based on the group percentage rather than their individual ISP.

Elections

FIELDS/DATA	DESCRIPTION
Refresh Icon	This icon will refresh the Elections data grid with the latest information.
Recalculate Icon	This icon will navigate to the Recalculate page.

FIELDS/DATA	DESCRIPTION
Eligibility Indicator	Displays a visual indicator for the eligibility of the specific location. The Eligibility Indicator includes three options: Eligible, Near Eligible, and Not Eligible as shown below. **Eligibility Indicators** ■ Eligible (ISP >= 40%) ■ Near Eligible (30% =< ISP < 40%) ■ Not Eligible (ISP < 30 %)
School Code	Displays the Local Code for the school within the selected SFA.
Location Name	Displays the Location Name for the school within the selected SFA.
Base Year	Displays the first year of 4-year cycle in CEP participation or displays a "—" if the school is not participating.
Total Sites	Displays the count of locations/sites included in the grouping for the specific location.
Total Identified	Displays the Identified Student Count.
Total Enrolled	Displays the Enrolled Student Count.
ISP %	Displays the current ISP % for the school within the selected SFA, a Trend Indicator and in some cases a warning icon. The warning icon is displayed when an action is required for Continuing a location; when hovering over the warning icon, it displays ISP of base year, and Calculated ISP base year so the user can compare with current year ISP to decide whether to Continue CEP participation in current 4 year cycle. ■ 61.56 ↓

FIELDS/DATA	DESCRIPTION
	Trend Indicators ↑ Current Year ISP Goes Up ↓ Current Year ISP Goes Down
Calculated ISP%	Displays the calculated ISP % which uses a 1.6 multiplier.
Participation Exist/New	Displays the existing CEP Participation Status and the New CEP Participation Status. The existing status refers to the status before any recalculations or updates were performed, while the new status refers to what the status will be when submitted.
Approval Status	Displays the current approval status for the location. Options include: | Status	Description
Submitted	The SFA has submitted the certified data to the state and is awaiting state approval for the location.
Approved	The SFA has submitted the certified data to the state and has been approved by the state. No additional steps are required for the location.
Rejected	The SFA has submitted the certified data to the state but the state rejected the submission for the location. If rejected, the SFA must correct the data issues and re-submit the Population data.
Pending	The SFA has not submitted the certified data to the state. The data should be submitted by the due date.	

FIELDS/DATA	DESCRIPTION
Data Grid Actions	Available actions are pre-built for each school based on current year ISP and in which year it is in the existing CEP participation cycle. In some cases, the Actions column will include a drop-down menu with options for configuring the CEP participation, while in others it only includes text. To edit participation information, the Recalculate action must be used.

Item/Option	Description
Continue	Displays as text and can only be edited from the Recalculate page.
Continue	Displays as a drop-down menu with Renew as another option.
Grace Year	Displays as text and can only be edited from the Recalculate page. A Grace Year can be applied to create an additional grace year of eligibility if the location is in the 4th year and has and ISP % between 30% and 40%.
Not Participating	Displays as text and can only be edited from the Recalculate page.
Individual Participation	Displays as text and can only be edited from the Recalculate page.
Renew	Displays as text and can only be edited from the Recalculate page.
Renew	Displays as a drop-down menu with Continue as another option.

» Drill-In: Allows the user to drill into the Population Details of the selected location.

FIELDS/DATA	DESCRIPTION
Form Actions	Displays a certification prompt and a Submit & Certify Elections button. In order to submit the Election data to the

FIELDS/DATA	DESCRIPTION
	State, the certification check box must be clicked before the Submit & Certify Elections button is clicked.

Grace Year:

At the end of the CEP four-year cycle, districts must reestablish their identified student percentage (ISP) to continue operating community eligibility. A Grace Year can be applied to create an extra year of eligibility in the same CEP cycle if the location is in the 4th year and has and ISP % between 30% and 40%. The percentage of meals reimbursed at the free rate during the grace year is based on the new lower ISP.

Election Details

The Elections Details page displays a Location/Cluster Header/Summary, Programs section, and Identified Students Section. This view can be used to identify specific program eligibility per program or student.

Elections Details - Location/Cluster Header Summary

This Summary panel will be displayed for individual sites/Locations and Clusters. The data that is displayed is the same except for the Local Code. This code is displayed for Locations and not Clusters.

Clusters

Cluster 1	2017 Base Year	3 Total Sites	545/827 Identified/Enrolled	61.56 ↓ ISP %	98.50 Calculated ISP %	Yes | -- Participation Exist. | New	◉ Submitted Approval Status

Locations

Brownfields Elementary School *(017016)*

2016	1	53/136	▮ 38.24 ↓	61.18	Yes | --	⚠ Pending
Base Year	Total Sites	Identified/Enrolled	ISP %	Calculated ISP %	Participation Exist. | New	Approval Status

FIELDS/DATA	DESCRIPTION
Location Name (Code)/Cluster Name	Displays the Location Name (Code) or Cluster Name for the selected location/cluster.
Base Year	Displays the first year of 4-year cycle in CEP participation or displays a "—" if the selected location/cluster is not participating.
Total Sites	Displays the count of locations/sites included in the selected location/cluster.
Total Identified	Displays the Identified Student Count for the selected location/cluster.
Total Enrolled	Displays the Enrolled Student Count for the selected location/cluster.
ISP %	Displays the current ISP Percentage, an Eligibility Indicator and a Trend Indicator for the selected location/cluster. ▪ **61.56** ↓ ▪ ISP % **Trend Indicators** ↑ Current Year ISP Goes Up　　↓ Current Year ISP Goes Down
Calculated ISP%	Displays the calculated ISP % which uses a 1.6 multiplier.

FIELDS/DATA	DESCRIPTION
Participation Exist/New	Displays the existing CEP Participation Status and the New CEP Participation Status for the selected location/cluster. The existing status refers to the status before any recalculations or updates were performed, while the new status refers to what the status will be when submitted.
Approval Status	Displays the current approval status for the selected location. Options include:

Status	Description
Submitted	The SFA has submitted the certified data to the state and is awaiting state approval for the location.
Approved	The SFA has submitted the certified data to the state and has been approved by the state. No additional steps are required for the location.
Rejected	The SFA has submitted the certified data to the state but the state rejected the submission for the location. If rejected, the SFA must correct the data issues and re-submit the Population data.
Pending	The SFA has not submitted the certified data to the state. The data should be submitted by the due date.

Elections Details - Sites (Cluster)

If the details are for a Cluster, a Sites section will be displayed. The Site (Cluster) sections lists all the sites included in the grouping. This is available when locations are clustered or grouped together to improve the ISP.

Sites

	School Code ⇕	Location Name ⇕	Total Identified ⇕	Total Enrolled ⇕	ISP % ⇕
▮	017011	Benjamin Franklin Elementary Math and Science School	255	303	84.05
▮	017027	Crestworth Elementary School	253	301	84.05
▯	017190	Lake Forest Elementary Charter School	37	223	16.59

FIELDS/DATA	DESCRIPTION
Eligibility Indicator	Displays a visual indicator for the eligibility of the specific location. The Eligibility Indicator includes three options: Eligible, Near Eligible, and Not Eligible as shown below. **Eligibility Indicators** ▮ Eligible (ISP >= 40%) ▮ Near Eligible (30% =< ISP < 40%) ▮ Not Eligible (ISP < 30 %)
School Code	Displays the Local Code for the school within the selected cluster.
Location Name	Displays the Location Name for the school within the selected cluster.
Total Identified	Displays the Identified Student Count.
Total Enrolled	Displays the Enrolled Student Count.
ISP %	Displays the current ISP % for the school within the selected cluster.

Elections Details - Programs

The Programs section will display the list of eligible programs with the count of eligible students per program. The list of programs may vary across years, as eligible programs are changed/added.

Programs							
DC Extended	Even Start	Foster	Head Start	Homeless/Runaway	Migrant	SNAP	TANF
2	26	13	29	11	4	461	27

Elections Details - Identified Students

The Identified Students section will display the list of eligible students with indicator of participation in a program.

Identified Students										
School Code ⇕	Student ID ⇕	DC Extended ⇕	Even Start ⇕	Foster ⇕	Head Start ⇕	Homeless/ Runaway ⇕	Migrant ⇕	SNAP ⇕	TANF ⇕	Count ⇕
017011								●		1
017011	938948987788				▲			●		2
017011	737558980763	●								1
017011	937948987854				▲			●		1
017027	393948922332							●		1

The Identified Students section includes the following fields.

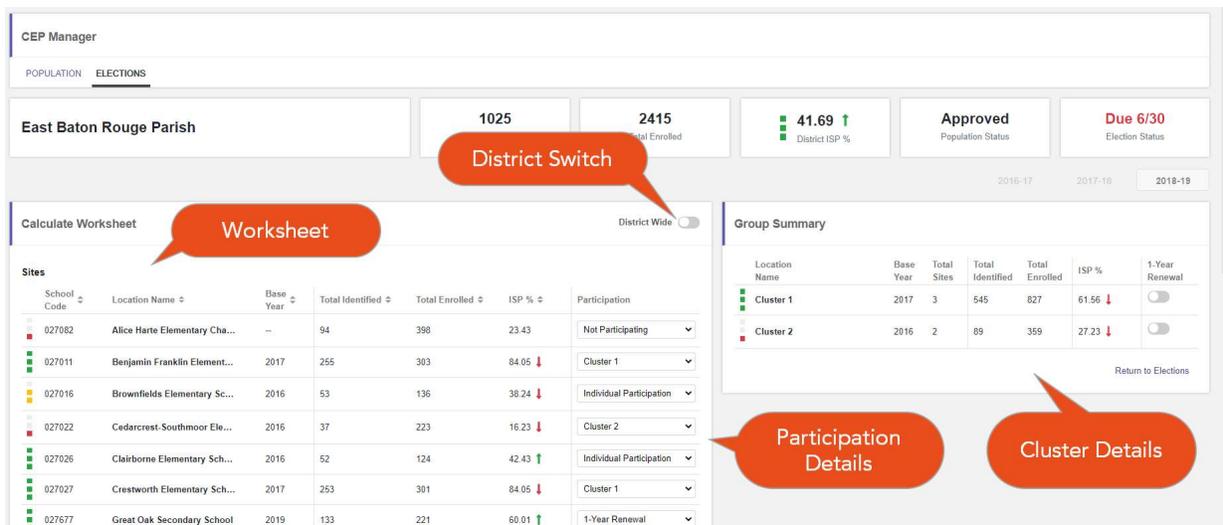| FIELDS/DATA	DESCRIPTION
School Code	Displays the school code where the student is enrolled/for the selected location.
Student ID	Displays the unique State Student Identifier for the eligible student.
Programs	Displays a column for each available program. If a student is eligible for a program, the application will display a Match Type Indicator in the column. The Match Type Indicators are: Match Type Indicators ▲ Manual Match ● System Match
Count	Displays the total count of programs the student is eligible for within the available programs list.

Recalculate

The Recalculate feature enables users to adjust/update the participation details for each location. The feature includes a Calculate Worksheet panel and Group Summary Panel. This feature can be accessed by clicking the Recalculate icon on the Elections tab view.
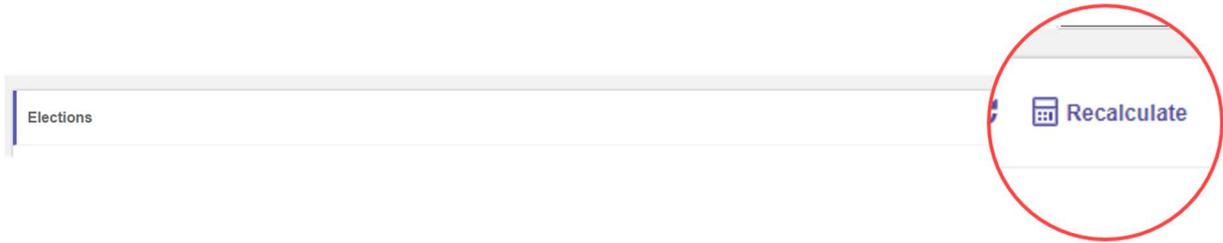
Calculate Worksheet

The Calculate Worksheet includes a Districtwide toggle and Site list for the selected SFA. The Worksheet enables users to cluster sites together, change participation information, and to view Elections data.

The Site list includes the following:

FIELDS/DATA	DESCRIPTION
Eligibility Indicator	Displays a visual indicator for the eligibility of the specific location. The Eligibility Indicator includes three options: Eligible, Near Eligible, and Not Eligible as shown below. Eligibility Indicators Eligible (ISP >= 40%) Near Eligible (30% =< ISP < 40%) Not Eligible (ISP < 30 %)
School Code	Displays the Local Code for the school within the selected SFA.
Location Name	Displays the Location Name for the school within the selected SFA.
Base Year	Displays the first year of 4-year cycle in CEP participation or displays a "—" if the school is not participating.
Total Identified	Displays the Identified Student Count.
Total Enrolled	Displays the Enrolled Student Count.
ISP %	Displays the current ISP % for the school within the selected SFA with a Trend Indicator. Trend Indicators ↑ Current Year ISP Goes Up ↓ Current Year ISP Goes Down
Participation	Displays a drop-down menu with the available options for the site based on the Base Year and ISP. The options available are: | Option	Description
1-Year Renewal	Some schools could have significant population change with increased identified student count due to major flooding or other circumstances after Elections had

FIELDS/DATA	DESCRIPTION
	been made on Election Due Date (e.g., June 30). Should such a change happen after Election Due Date (e.g., in August), USDA may force a change from 4 year-cycle to one year for the school as special case. This is only available in these special case scenarios
Cluster 1, 2, 3, etc.	Indicates the group/cluster number the location will belong to for Elections.
Not Participating	Indicates the location will not be participating in the upcoming Elections process.
Individual Participation	Indicates the location will be participating in the upcoming Elections process. The ISP must be above 40% or within the same 4-year cycle.

Group Summary

The Group Summary displays information about any groups/clusters or District-wide that have been created. Groups/Clusters can be created to maximize reimbursement opportunities. For example, four sites can be clustered together if the ISP for the group is 40% or above.
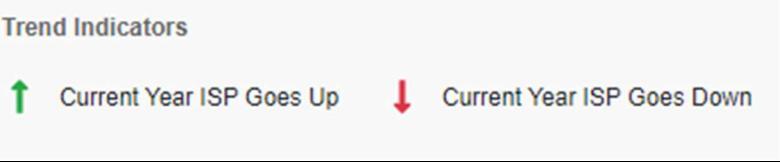
The Group Summary includes the following data/options:

FIELDS/DATA	DESCRIPTION
Eligibility Indicator	Displays a visual indicator for the eligibility of the specific location. The Eligibility Indicator includes three options: Eligible, Near Eligible, and Not Eligible as shown below.
Location Name	Displays the Cluster Name or "District Wide" for the school within the selected SFA.
Base Year	Displays the first year of 4-year cycle in CEP participation or displays a "—" if the cluster/district wide is not participating.
Total Sites	Displays the total number of sites in the group.
Total Identified	Displays the Identified Student Count.
Total Enrolled	Displays the Enrolled Student Count.

FIELDS/DATA	DESCRIPTION
ISP %	Displays the current ISP % for the cluster/district wide within the selected SFA with a Trend Indicator. **Trend Indicators** ↑ Current Year ISP Goes Up ↓ Current Year ISP Goes Down
1 Year Renewal	Displays a toggle for a 1 Year Renewal when appropriate.
Return to Elections Links	When clicked, the application will return to the Elections Tab.

Lesson: How to Access CEP Manager – Elections Tab

1. On the CEP Manager icon ( ) on the left side navigation bar.

2. The application will display the CEP Manager page and will default to the Population tab.

3. Click on the Elections Tab link.

4. The application will navigate to the Elections Tab.

Lesson: How to Refresh Election Data

1. Access CEP Manager – Elections as described in the above lesson.

2. Click the Refresh icon (   ). Note: Refresh icon will be enabled after population data is approved and after Population Due Date.

3. The application will refresh the enrollment and eligibility data based upon the latest data in the application.

Lesson: How to View Election Historical Data

1. Access CEP Manager – Elections as described in the above lesson.

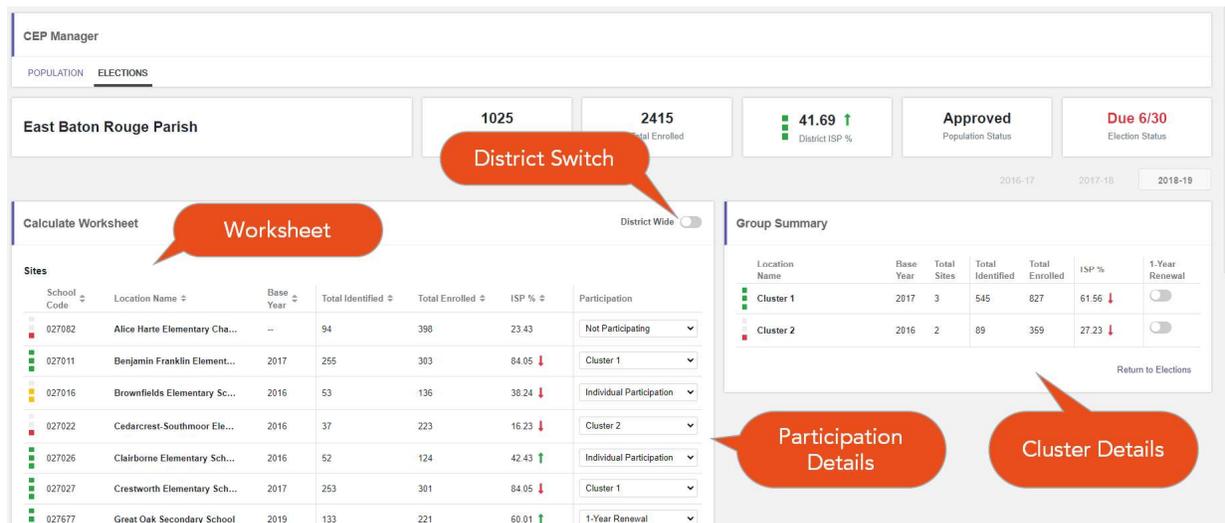2. Click on the Year Selector button for the desired year.

| 2016-17 | 2017-18 | **2018-19** |

3. The application will display the Election data for the selected year.

4. To return to the current year, click the Year Selector for the current year.

Lesson: How to Recalculate Elections – Change to District Wide

1. Access CEP Manager – Elections as described in the above lesson.

2. Click on the Recalculate icon ( ).

3. The application will navigate to the Elections Recalculate page, which includes the Calculation Worksheet and Group Summary.

4. Click the District Wide toggle in the Calculation Worksheet header if he District ISP >=40%

5.

6. The application will display Switch District Wide prompt, which requires the user to Cancel or confirm the change by clicking the Switch to District Wide.

Switch to District Wide ✕

If you have made changes in Elections to the cluster or school participation settings, these changes will be deleted if you switch to District Wide. Are you sure you want to switch to District Wide?

Cancel **Switch to District Wide**

7. If the switch to District Wide is confirmed, the application will set all the locations to "Participating" and will add the district to the Group Summary panel.

8. Review the updates to verify the data is accurate.

9. Click the Return to Elections link in the Group Summary panel.

Lesson: How to Recalculate Elections – Change to Participation

1. Access CEP Manager – Elections as described in the above lesson.

2. Click on the Recalculate icon (🔲 Recalculate).

3. The application will navigate to the Elections Recalculate page, which includes the Calculation Worksheet and Group Summary.

4. In the Calculation Worksheet, locate the site to be updated.

5. The application will pre-populate the Participation column with existing settings, such as Individual Participation or Not Participating based on the current data.

6. Locate the location/site to be updated and select the appropriate Participation value from the drop-down menu.

    a. If a site is currently Not Participating and the ISP is below 40%, the site cannot be set to Participating.

    b. If a site currently has an ISP below 40%, but can be clustered/grouped to enable eligibility, select the appropriate cluster from the drop-down menu.

7. If locations have been added to a cluster, the Group Summary panel data will be updated.

8. Click Return to Elections when the Participation values have been updated.
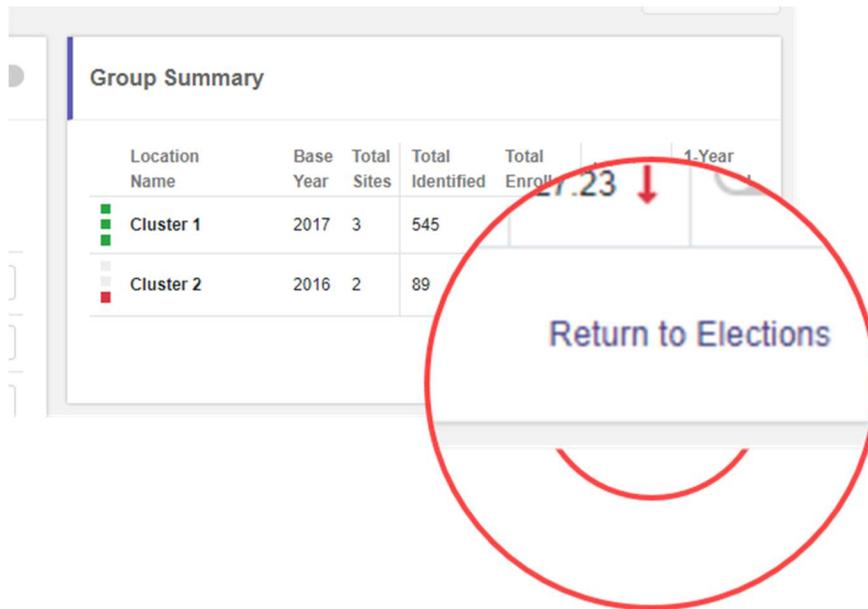
Lesson: How to Submit Elections

1. Access CEP Manager – Elections as described in the above lesson.

2. Review the Elections data to determine that counts and election decisions are accurate for each location in the list.

3. Drill into Elections Details as necessary by clicking the Drill In icon (»).

4. Once the numbers and elections have been verified, click the certification prompt below the list of locations.

   a. By clicking the certification prompt, the user is confirming that the information being submitted is correct and accurate.

5. Click the Submit & Certify Elections button.

6. When the form is submitted, the application will confirm a successful submission in two ways:

a. Page Success Message – The application will display a "Election data has been submitted successfully." message at the top of the page below the main navigation bar.

✓ Population data has been submitted successfully.

b. Approval Status Update – The application will change the Approval Status value for each location record to "Submitted".

Submitted

c. Location Header – Election Status Update – The application will change the Election Status on Location Header to "Submitted".

Submitted
Election Status

7. Once it is submitted, the State will need to approve or reject the submission for the process to be completed.

a. If the State approves the submission, the Approval Status value for each location record to "Approved".

Approved

a. When all locations are approved by the State, the application will change the Election Status on Location Header to "Approved".

Approved
Election Status

b. If the State rejects the submission, the Approval Status value for each location record to "Rejected".

🚫 Rejected

8. If the State has approved elections for all locations and then SFA needs to resubmit elections for a location before Election Due Date, the State will need to Reject the location and Reopen Submission so that the SFA can resubmit.

9. Once the State has approved elections for all locations and it reaches Elections Due Date, the Elections will be closed. All actions will be disabled. Lesson: How to View Election Location Details

Lesson: How to Resolve Rejected Records

1. If one or many of the records were rejected within a submission, the State will need to Re-Open the submission.

2. Once the submission has been re-opened, the Election status on Location header will change to "Reopen". The rejected record should be corrected by updating enrollment records or eligibility records.

3. Verify and review the counts/data for the rejected sites. Update data as necessary.

4. Check/Select the Certification option to verify the data is accurate.

   a. By clicking the certification prompt, the user is confirming that the information being submitted is correct and accurate.

   Submit & Certify Elections

5. Click the Submit & Certify Election button.

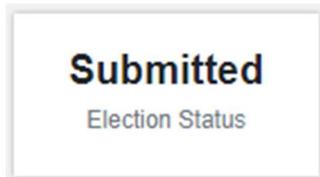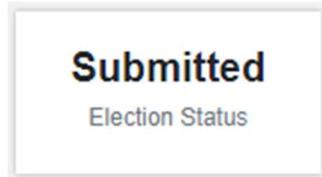6. When the form is submitted, the application will confirm a successful submission in two ways:

   a. Page Success Message – The application will display a "Election data has been submitted successfully." message at the top of the page below the main navigation bar.

   b. Approval Status Update – The application will change the Approval Status value for each location record to "Submitted".

○ Submitted

    c. Location Header – Election Status Update – The application will change the Election Status on Location Header to "Submitted".

Submitted
Election Status

7. Once it is submitted, the State will need to approve or reject the submission for the process to be completed.

    a. If the State approves the submission, the Approval Status value for each location record to "Approved".

✓ Approved

           a. When all locations are approved by the State, the application will change the Election Status on Location Header to "Approved".

Approved
Election Status

    b. If the State rejects the submission, the Approval Status value for each location record to "Rejected".

🚫 Rejected

🔖 Reports

Chapter Highlights

- Overview
- Reports
- [My Activity](My%20Activity)
- [Lesson: How to Generate a Report](Lesson:%20How%20to%20Generate%20a%20Report)

Overview

The Reports component provides authorized users with access to the reports available in the application. Each report can be disabled/enabled for a specific role. Reports are accessible via the Reports (📄) icon on the left navigation panel. If the icon is not available, the Reports component must be enabled for the role. The Reports component includes a Reports panel and a My Activity panel as described below.

Reports

The Reports panel contains a list of reports, report descriptions, and an action link. If a report requires special parameters, a "Customize Report" link will be available, otherwise a "Generate Report" link will be available. If Customize Report is clicked, the application will display a Customize Report page with customization form for the selected report. The form will vary per report requirements. The Generate Report link will initiate the report request and will update the My Activity panel with information about the report.

The Reports available in the application are:

REPORT	DESCRIPTION
Locations Serving only NSLP with High ISP	This report lists locations serving only National School Lunch Program with ISP >= 40%.

My Activity

The My Activity panel contains a list of reports that have been generated previously by the user. The panel will include a Filter action, Report Name, status, action link, and the report date.

If a report is in progress, the My Activity panel will display a processing icon and "Generating". If the report has completed, a Start Download action will be available.
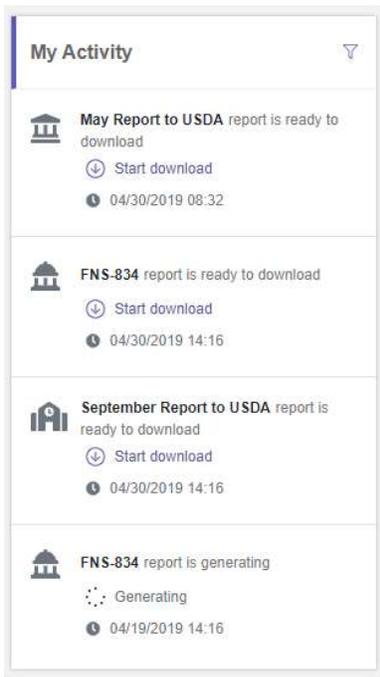
Lesson: How to Generate a Report

1. On the Report icon ( ) on the left side navigation bar.

2. The application will display the Report page.

    a. The reports list will vary depending on permissions to reports.

3. Click on the Generate Report link for the appropriate Report.

Locations Serving only NSLP with High ISP | This report lists locations serving only National School Lunch Program with ISP

Generate Report

4. The application will initiate the generation of the report and will update the My Activity panel.

5. When the Report has completed processing, click the Start Download link.

6. The application will initiate the download using the web browser download mechanism.

   a. The Report will be saved to the Downloads folder on the local computer in most cases.